

N.B. GROWN
ADVERTISING EFFECTIVENESS
SURVEY
FINAL REPORT

PREPARED BY:
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Fredericton, N.B.
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New Brunswick Department of
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Development
Fredericton, N.B.

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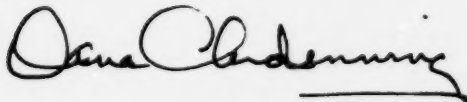
Mr. Michael McCormick
New Brunswick Department of Agriculture
and Rural Development
Market Development Branch
Fredericton, New Brunswick

Dear Mr. McCormick:

I am pleased to submit the Final Report of the
N.B. Grown Advertising Effectiveness Survey.
This report addresses all of the comments and
suggestions made by your Branch with respect to
the Draft Report.

It is my hope that the report will be useful in
guiding the future direction of your marketing
efforts. Thank you very much for the opportunity
to work with you on this most interesting
assignment.

Very truly yours,



Dana B. Clendenning

Enclosure

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EXECUTIVE SUMMARY

Clendenning Associates was contracted by the Market Development Branch of the New Brunswick Department of Agricultural and Rural Development to determine the effectiveness of the N.B. Grown Marketing Campaign. The study was carried out in the form of a province-wide telephone survey of consumers.

As the first step, the questionnaire for the survey was designed and pretested. While the questionnaire was being translated to French, the survey sample was selected from the province's telephone directories. After a short training session with the interviewers, the actual interviewing began and was completed between the 17th and 30th of November, 1982.

The questionnaires were coded and analysed using the SPSS system resident on the University of New Brunswick central computer.

The survey findings can be summarized as follows:

- . Approximately half of the respondents check to see where a product is produced before purchasing, of these most indicated that the area of origin influenced their choice.

- . Most of the respondents who indicated that where a product was produced made a difference in their choice named New Brunswick as their preferred producing area.
- . Approximately half of the respondents felt that New Brunswick agricultural food products were available half of the year to most of the year. A significant number of respondents felt that they were available for a few months or less.
- . The majority of respondents felt that N.B. agricultural food products were about the same or better in quality than products from other producing areas.
- . Respondents did not appear to perceive a significant difference between the price of N.B. agricultural food products and those from other producing areas.
- . A majority of respondents recalled seeing some advertising for N.B. agricultural food products and more respondents recalled the N.B. Grown Symbol (68.1%) than the slogan (59.8%).
- . A majority of respondents recalled seeing the television advertising and the most recalled characteristic of this advertising was the N.B. Grown Symbol. Most respondents did not recall the slogan from the television advertising, however a significant number did mention specific products. Respondents recalled seeing the television advertising in the fall of 1982 most often.

- . Radio advertising was recalled by a minority of respondents and specific products and music were the most recalled characteristics of this advertising. Respondents recalled hearing the radio advertising in the fall of 1982 or could not recall the specific time period.
- . Slightly more than one third of the respondents recalled the newspaper advertising. The slogan and symbol were the most frequently recalled characteristics of the advertising. Newspaper advertising was seen most often in the fall of 1982 and somewhat often in the summer of 1982.
- . Slightly less than half of the respondents recalled the food store advertising. The slogan was the most recalled characteristic of the advertising. A significant number of respondents recalled the symbol and specific products as well. Respondents noticed the advertising most frequently in the fall of 1982 and fairly often in the summer.
- . Mall displays had the lowest recall of all of the advertising vehicles used, a small percentage of respondents noticed the displays. The most frequently recalled characteristic of the advertising was the slogan. Respondents recalled seeing the displays in the fall of 1982 and to a lesser extent in the summer of 1982.
- . Respondents who were 20 - 49 years of age showed the highest awareness of the slogan, particularly those between the ages of 20 - 29. Slogan awareness tends to decrease as age increases.

- . Respondents between the ages of 20 - 49 were the most aware of the symbol. As with the slogan, awareness of the symbol tends to decrease as age increases.
- . Respondents between the ages of 20 - 39 and 50 - 59 showed the highest awareness of food store advertising. Awareness of the advertising was lower among respondents who were 60 and over.
- . Awareness of advertising for N.B. agricultural food products tends to increase as the education level of respondents increases.
- . The higher the education of respondents, the more likely they are to be aware of the slogan.
- . As in the case of the slogan, awareness of the N.B. Grown symbol tends to increase as the respondents education level increases.
- . Recall of the television advertising was generally high, although it did tend to increase somewhat as education level increased.
- . Generally, respondents had a high opinion of the quality of N.B. agricultural food products regardless of their education level. Respondents with the highest opinion were those who had completed high school.
- . English respondents had a higher opinion of the supply of N.B. agricultural food products than did the French.
- . English respondents were somewhat more aware of the N.B. Grown symbol than were the French.
- . English respondents showed a much higher awareness of the slogan than did the French.

- . Awareness of advertising for N.B. agricultural food products tends to increase as household incomes increase.
- . Awareness of the slogan also tends to increase as the household income of respondents increases.
- . The level of awareness of the N.B. Grown Symbol tends to increase as household incomes increase.
- . There appears to be a strong preference for N.B. agricultural food products throughout the province, particularly in Woodstock and Newcastle. St. Stephen and Campbellton showed the lowest preference for N.B. products.
- . Respondents from Edmundston, Campbellton and St. Stephen had the most negative perceptions of the price of N.B. products while respondents in Bathurst and Fredericton showed the most positive opinions.
- . Respondents in Fredericton had the highest opinion of the supply of N.B. agricultural food products while respondents in Edmundston and Campbellton tend to feel that they are available only for a few weeks to a few months.
- . Respondents in St. Stephen, Fredericton and Saint John indicated a high awareness of the slogan. The lowest slogan awareness was recorded in Newcastle, Edmundston and Bathurst.
- . The N.B. Grown symbol was the most recalled characteristic of the television advertising in all areas of the province except Campbellton and St. Stephen. Recall of the slogan from the television advertising was low.

- . Respondents in most areas of the province recalled seeing the television advertising in the fall of 1982. A significant number of respondents in Newcastle and Bathurst noticed the advertising in the summer of 1982.
- . Recall of the slogan in the newspaper advertising was highest in Moncton and Edmundston while recall of the N.B. Grown symbol was highest in Campbellton and Bathurst.
- . In most areas of the province, respondents recalled seeing the newspaper advertising in the fall or summer of 1982. Moncton is a notable exception, in this area 57.6% of the respondents recalled seeing the advertising in the spring or earlier.
- . Awareness of the food store advertising was lowest in St. Stephen and Bathurst. Areas where food store advertising awareness was highest were Newcastle and Fredericton.
- . The slogan was the most recalled characteristic of the food store advertising. In Moncton 75% of the respondents recalled the slogan and some other characteristic of the advertising as did 66.7% of the respondents in the Newcastle area. The symbol did not achieve a high recall in any area of the province as part of the food store advertising.
- . Respondents recalled seeing the food store advertising in the fall of 1982 and to a lesser extent in the summer of 1982. Most respondents in Fredericton and Saint John recalled seeing the advertising in the fall while those in Newcastle and Bathurst mentioned the summer most often. A significant number of Moncton respondents recalled seeing the advertising early in 1982.

The following conclusions have been drawn with respect to the effectiveness of the N.B. Grown Promotion Program.

- . There was a high recall (68.1%) among respondents of the N.B. Grown Symbol and television appeared to be the most effective medium for making consumers aware of the symbol. Consumers with a low education level, a low household income or who spoke French as their main language, were less likely to have been aware of the symbol.
- . Recall of the slogan was relatively high at 58.1%. There was a high recall of the slogan from food store advertising. Consumers with low incomes, a low education level or who spoke French as their main language, were less likely to be aware of the slogan.
- . Among consumers in New Brunswick whose purchasing is influenced by where a product is produced the preference for New Brunswick agricultural products is high. There is, however, a significant percentage (48.8%) of consumers whose purchasing habits are not influenced by where a product is grown or produced.

- . The price and quality of N.B. agricultural food products are considered to be comparable to or better than products from other producing areas. Perceptions of the supply or availability of N.B. products are better among English than among French speaking consumers.
- . Television advertising was the most recalled promotional vehicle used in the campaign. Recall of the television advertising tends to increase with the education level of respondents.
- . Radio advertising had a low recall, however, this may be a result of the media mix used during the campaign.
- . Newspaper advertising placed third in terms of respondent recall. The slogan and symbol were the most recalled characteristics of this form of advertising.
- . Food store advertising had a high recall in most areas of the province and this medium was particularly effective in getting the slogan across to the consumer.
- . Mall displays were the least recalled form of promotion. If the displays were limited in number a low recall is to be expected.

1.0 INTRODUCTION

Since June of 1980, the New Brunswick Department of Agriculture and Rural Development have been conducting the N.B. Grown Promotional Program. The program is designed to promote New Brunswick agricultural food products within the province. The promotional vehicles used in the program have included television, radio, newspaper, point of sale materials and mall displays.

In October of 1982 Clendenning Associates was contracted by the Marketing Branch of the Department of Agriculture and Rural Development to determine the effectiveness of the program in influencing consumer awareness and behavior. The study was carried out in the form of a province wide telephone survey of consumers. This report presents the survey findings, analysis and conclusions.

2.0 METHODOLOGY

The population chosen for this survey was those consumers who were the main food purchases for their household. A questionnaire was designed to determine the awareness among this population of the N.B. Grown promotional program and their attitudes toward N.B. agricultural food products. A copy of the French and English questionnaires have been included in Appendix I.

A systematic random sample of the population was chosen using the province's telephone books. Through consultation with the client, the total number of interviews required (325) was determined based on past experience, acceptable level of accuracy and the size of the population to be surveyed. An extra 50 telephone numbers were selected to account for disconnected lines or respondent refusal. The number of listings to be drawn from each book was determined using the following formula:

$$\frac{\text{TOTAL LISTINGS IN A DIRECTORY}}{\text{TOTAL LISTINGS FOR NEW BRUNSWICK}} \times \text{SAMPLE SIZE} = \frac{\text{TELEPHONE NUMBERS REQUIRED FROM THIS DIRECTORY}}{\text{SAMPLE SIZE}}$$

Having determined the number of listings to be selected from each directory, the selection interval was determined using the following formula:

$$\frac{\text{TOTAL COLUMN INCHES IN A DIRECTORY}}{\text{SAMPLE REQUIRED}} = \frac{\text{SELECTION INTERVAL IN INCHES}}{\text{SAMPLE REQUIRED}}$$

The starting point for selecting a sample was determined by generating a random number between 1 and 200. If, for example, the random number generated was 75, the selection interval would be measured off beginning with the 75th residential listing in a directory, at which point the first number was selected for our sample. Beginning with the selected number, the interval was measured off once again and the next number selected. This procedure was repeated until reaching the end of each directory.

To ensure that even the unlisted numbers had a chance of being selected, the last two digits of each seven digit telephone number were generated from a table of random numbers.

The questionnaire was pretested using a small sample of respondents from the Fredericton area. Modifications were made to the questionnaire after which a short training session was held with the interviewers. The telephone interviewing was completed between the 17th and 30th of November, 1982.

The completed surveys were then coded and analysed using the SPSS system resident on the University of New Brunswick central computer.

3.0 LIMITATIONS OF THE SURVEY

As with most surveys, problems often arise in conducting the actual interviews. Question wording, interviewer delivery or the respondents ability to grasp the subject can all cause some misinterpretation. In this survey, wording problems were identified in the French questionnaire early in the interview phase. More appropriate phrases were incorporated into the questionnaire at that time.

Although it did not appear to be a significant problem in this case, confusion of one advertising campaign with another similar campaign can sometimes affect the level of advertising recall. The times that the various forms of advertising were used or aired is more likely to have influenced the results of this survey.

4.0 EXPLANATION OF TABLES

As mentioned in the previous section, the completed surveys were subjected to a computer analysis, the results of these analyses have been transcribed into tables which are presented in the next section.

Tables 1 -31 give the frequency of responses in each category of a given question, the percentage of the total number of respondents in each category has also been included. Where appropriate, interpretive comments are also given after each table.

Tables 32 -56 are crosstabulation tables. In these tables the frequency of responses for two variables are given in an effort to determine if a relationship exists. The chi-square statistic was used to determine the degree of association between the two variables. Generally, the larger the chi-square the greater the chance that a relationship exists. Using the chi-square, the probability of a relationship existing has been determined for each table, for this survey a probability of .05 or less was considered to be significant.

The chi-square and probability statistics are noted at the bottom of each crosstabulation table along with any relevant interpretive comments.

5.0 DATA ANALYSIS

5.1 Frequency Tables

QUESTION 1 Before you purchase agricultural food products, do you generally look to see where they are grown or produced?

TABLE 1

LOOK TO SEE WHERE PRODUCED

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	159	48.8
Yes	164	50.3
Other	2	0.6
Don't Know	1	0.3
	<u>326</u>	<u>100.0</u>

Slightly more than half (50.3%) of all respondents check to see where agricultural food products are grown or produced before purchasing, 48.8% do not check a product's source.

QUESTION 2 Does this (area where grown or produced)
make a difference in your choice?

TABLE 2

IMPACT OF WHERE PRODUCED ON CHOICE

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	13	4.0
Yes	147	45.1
Other	4	1.2
Don't Know	1	0.3
Not Applicable	160	49.1
Not Ascertained	<u>1</u>	<u>0.3</u>
	326	100.0

Respondents who answered "No" or "Don't Know" to Question 1 were not asked Question 2 resulting in a high response (49.1%) in the "Not Applicable" category. The affirmative response (45.1%) is high given the fact that only 50.9% of all respondents were asked this question.

QUESTION 3 Which producing or growing area
or province do you prefer?

TABLE 3

PREFERRED PRODUCING AREA

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Local or N.B.	131	40.2
P.E.I.	8	2.5
Atlantic	15	4.6
Canadian	1	0.3
Other	7	2.1
Don't Know	3	0.9
Not Applicable	160	49.1
Not Ascertained	1	0.3
	<u>326</u>	<u>100.0</u>

Since 49.1% of respondents were not asked this question due to a previous screen question, the 40.2% of respondents who prefer "local or N.B." products is high relative to the number (50.8%) of respondents who were asked this question.

QUESTION 4 (a) When compared to products from other areas or provinces do you consider the price of New Brunswick Agricultural Food Products to be; much higher than most, slightly higher than most, about the same, slightly lower than most or much lower than most.

TABLE 4

PRICE OPINION OF N.B. AGRICULTURAL
FOOD PRODUCTS

<u>CATEGORY</u>	<u>NUMBER OF</u> <u>RESPONDENTS</u>	<u>% OF</u> <u>TOTAL</u>
Much Higher Than Most	9	2.8
Little Higher Than Most	36	11.0
About the Same	154	47.2
Little Lower than Most	48	14.7
Much Lower Than Most	4	1.2
Other	10	3.1
Don't Know	64	19.6
Not Applicable	1	0.3
	326	100.0

Respondents did not appear to perceive a significant difference between the price of N.B. agricultural food products and those from other producing areas.

QUESTION 4(b) What is your opinion of the supply,
that is the availability of New
Brunswick Agricultural Food Products?
Would you say that they are available:
most of the year, about half of the year,
only for a few months or only for a few
weeks?

TABLE 5

SUPPLY OPINION OF N.B. AGRICULTURAL FOOD PRODUCTS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Most of Year	73	22.4
Half of Year	87	26.7
Few Months	98	30.1
Few Weeks	9	2.8
Other	9	2.8
Don't Know	49	15.0
Not Applicable	1	0.3
	<u>326</u>	<u>100.0</u>

Nearly half (49.1%) of all respondents felt that
N.B. Agricultural food products were available
"Half of the Year" to "Most of the Year", 32.9%
felt they were available for a few months or less
while 15% didn't know.

QUESTION 4(c) What is your opinion of the quality of New Brunswick Agricultural Food Products compared to the quality of products from other producing areas? Would you say that they are: much better in quality, slightly better in quality, about the same, slightly poorer in quality or much poorer in quality?

TABLE 6

QUALITY OPINION OF N.B. AGRICULTURAL FOOD PRODUCTS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Much Better	78	23.9
Slightly Better	88	27.0
About the Same	115	35.3
Slightly Poorer	5	1.5
Much Poorer	2	.6
Other	1	.3
Don't Know	36	11.0
Not Applicable	1	0.3
	<u>326</u>	<u>100.0</u>

A total of 281 or 86.2% of all respondents felt that N.B. agricultural food products were "about the same" to "much better" in quality than products from other producing areas.

QUESTION 5 Have you ever seen, read or heard
any advertising for New Brunswick
Agricultural Food Products?

TABLE 7

SEEN, READ OR HEARD ADVERTISING FOR
N.B. AGRICULTURAL FOOD PRODUCTS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	117	35.9
Yes	199	61.0
Don't Know	8	2.5
Not Ascertained	2	0.6
	<u>326</u>	<u>100.0</u>

Of the total number of respondents, 61% recall seeing
same advertising for N.B. agricultural food products,
while 35.9% did not see any such advertising.

QUESTION 6 Have you ever seen, read or heard the slogan or phrase "Our Best Belongs to You"?

TABLE 8

SLOGAN AWARENESS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	130	39.9
Yes	195	59.8
Not Ascertained	1	0.3
	<u>326</u>	<u>100.0</u>

The majority of respondents (59.8%) recalled the slogan "Our Best Belongs to You", while the negative response rate was 39.9%.

QUESTION 7 Have you ever seen, read or heard
the symbol or trademark "N.B. Grown"?

TABLE 9

SYMBOL AWARENESS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	103	31.6
Yes	222	68.1
Don't Know	1	0.3
	<u>326</u>	<u>100.0</u>

There was a higher recall (68.1%) of the "N.B. Grown"
symbol than of the slogan (59.8%), 31.6% of respondents
did not recall the symbol compared to 39.9% for the slogan.

QUESTION 8(a) Have you ever seen, read or heard the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" on the television?

TABLE 10

RECALL OF SYMBOL OR SLOGAN ON TELEVISION

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	35	10.7
Yes	216	66.3
Don't Know	2	0.6
Not Applicable	73	22.4
	326	100.0

The majority of respondents (66.3%) noticed the symbol, slogan or both on television. A total of 73 or 22.4% of all respondents were not asked this question because of previous screen questions.

QUESTION 8(b) What do you recall about the television advertising?

TABLE 11

TELEVISION ADVERTISING RECALL

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
N.B. Symbol Only	47	14.4
Slogan Only	2	0.6
Symbol and Slogan Only	3	0.9
Symbol and Multiple	57	17.5
Slogan and Multiple	3	0.9
Specific Prod. and Multiple	3	0.9
Symbol, Slogan and Multiple	6	1.8
Multiple Background	3	0.9
Wording	2	0.6
Visuals	12	3.7
Music	11	3.4
Specific Products	20	6.1
Other	3	0.9
Don't Know	43	13.2
Not Applicable	110	33.7
Not Ascertained	1	0.3
	326	100.0

Note: In this table the term "multiple" refers to one or more of; wording, visuals, music or specific products. The term "multiple background" refers to two or more of; wording, visuals, music or specific products.

The "N.B. Grown" symbol was by far the most successful part of the television advertising in terms of respondent recall, 34.7% of those interviewed mentioned the symbol either alone or in combination with some other characteristic(s) of the television advertising. Only 4.3% of respondents recalled the slogan either alone or in combination with some other characteristic(s) of the television advertising. Respondents mentioned "specific products" more often than the slogan.

QUESTION 8(c) When did you notice the television advertising?

TABLE 12

TIME RECALL OF T.V. ADVERTISING

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Before 1982	21	6.4
Early 1982	15	4.6
Spring 1982	13	4.0
Summer 1982	22	6.7
Fall 1982	63	19.3
Summer and Fall	1	0.3
Spring and Fall	1	0.3
Before 1982 and Fall	1	0.3
Don't Know	73	22.4
Not Applicable	110	33.7
Not Ascertained	5	1.5
Other	1	0.3
	<u>326</u>	<u>100.0</u>

As might be expected, respondents recalled seeing the television advertising in the fall of 1982 most often. A significant number of respondents also mentioned "summer 1982" and "before 1982".

QUESTION 9(a) Have you ever heard the slogans
or symbols "N.B. Grown" or "Our
Best Belongs to You" on the radio?

TABLE 13

RECALL OF SYMBOL OR SLOGAN ON RADIO

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	198	60.7
Yes	51	15.6
Don't Know	3	0.9
Not Applicable	73	22.4
Not Ascertained	1	0.3
	326	100.0

Only 15.6% of all respondents recalled hearing
"N.B. Grown" or "Our Best Belongs to You" on the
radio. A total of 73 or 22.4% of all respondents
were not asked this question due to a previous
screen question.

QUESTION 9(b) What do you recall about the
radio advertising?

TABLE 14

RADIO ADVERTISING RECALL

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
N.B. Symbol Only	4	1.2
Slogan Only	1	0.3
Symbol and Multiple	1	0.3
Slogan and Multiple	3	0.9
Specific Products and Multiple	2	0.6
Wording and Music Only	2	0.6
Wording Only	1	0.3
Music Only	8	2.5
Specific Products Only	12	3.7
Don't Know	16	4.9
Not Applicable	274	84.0
Not Ascertained	1	0.3
Other	1	0.3
	326	100.0

Note: In this table the term multiple refers to one or more of; wording, music or specific products. Specific products followed by music were the most frequently recalled characteristics of the radio advertising.

QUESTION 9(c) When did you hear the radio advertising?

TABLE 15

TIME RECALL OF RADIO ADVERTISING

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Before 1982	3	0.9
Early 1982	3	0.9
Spring 1982	2	0.6
Summer 1982	5	1.5
Fall 1982	16	4.9
Don't Know	21	6.4
Not Applicable	274	84.0
Not Ascertained	2	0.6
	326	100.0

As in the case of television, respondents recalled hearing the radio advertising in the "fall of 1982" most often.

QUESTION 10(a) Have you ever seen, or read the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" in the newspaper?

TABLE 16

RECALL OF SLOGAN OR SYMBOL IN NEWSPAPER

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	127	39.0
Yes	119	36.5
Other	1	0.3
Don't Know	6	1.8
Not Applicable	73	22.4
	<u>326</u>	<u>100.0</u>

Of the total number of respondents, 36.5% recalled noticing the "N.B. Grown" symbol or slogan in the newspaper. A total of 73 or 22.4% of all respondents were not asked this question due to previous screen questions.

QUESTION 10(b) What do you recall about the newspaper advertising?

TABLE 17

NEWSPAPER ADVERTISING RECALL

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
N.B. Symbol Only	29	8.9
Symbol and Slogan Only	2	0.6
Slogans and Multiple	32	9.8
Specific Products and Multiple	1	0.3
Symbol and Slogan and Multiple	1	0.3
Recipes Only	5	1.5
Graphics Only	4	1.2
Specific Products Only	9	2.8
Other	4	1.2
Don't Know	32	9.8
Not Applicable	206	63.2
Not Ascertained	1	0.3
	<u>326</u>	<u>100.0</u>

Note: In this table the term "multiple" refers to one or more of; recipes, graphics or specific products.

The slogan and symbol were the most frequently recalled characteristics of the newspaper advertising. The slogan was mentioned either alone or in combination with other characteristics of the newspaper advertising by 35 or 10.7% of all respondents. The symbol was mentioned alone or in combination with other characteristics of the advertising by 32 or 9.8% of all respondents.

QUESTION 10(c) When did you see the newspaper advertising?

TABLE 18

TIME RECALL OF NEWSPAPER ADVERTISING

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Before 1982	6	1.8
Early 1982	10	3.1
Spring 1982	9	2.8
Summer 1982	24	7.4
Fall 1982	27	8.3
Don't Know	41	12.6
Not Applicable	206	63.2
Not Ascertained	3	0.9
	326	100.0

Respondents recalled seeing the newspaper advertising in the "fall of 1982" (8.3%) most often, followed by the "summer of 1982" (7.4%). It should be noted that 12.6% or 41 respondents didn't know when they had seen the newspaper advertising.

QUESTION 11(a) Have you ever seen, or read the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" in food stores?

TABLE 19

RECALL OF SLOGAN OR SYMBOL IN FOOD STORES

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	97	29.8
Yes	153	46.9
Don't Know	3	0.9
Not Applicable	73	22.4
	<u>326</u>	<u>100.0</u>

Of the total number of respondents 153 or 46.9% recall noticing the symbol or slogan in food stores. A total of 73 or 22.4% of respondents were not asked this question due to previous screen questions.

QUESTION 11 (b) What do you recall about
the food store advertising?

TABLE 20

FOOD STORE ADVERTISING RECALL

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
N.B. Symbol Only	33	10.1
Slogan Only	1	0.3
Symbol and Slogan Only	4	1.2
Symbol and Multiple	4	1.2
Slogan and Multiple	64	19.6
Specific Products and Multiple	6	1.8
Posters Only	3	0.9
Price Cards Only	1	0.3
Specific Products Only	25	7.7
Don't Know	12	3.7
Not Applicable	173	53.1
	326	100.0

Note: In this table the term multiple refers to one or more of posters, price cards, or specific products.

The slogan was the most often mentioned characteristics of the food store advertising followed by the "N.B. Grown" symbol and specific products.

QUESTION 11(c) When did you see the food store advertising?

TABLE 21

TIME RECALL OF FOOD STORE ADVERTISING

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Before 1982	6	1.8
Early 1982	15	4.6
Spring 1982	9	2.8
Summer 1982	27	8.3
Fall 1982	55	16.9
Summer and Fall	1	0.3
Don't Know	36	11.0
Not Applicable	173	53.1
Not Ascertained	2	0.6
Other	2	0.6
	<u>326</u>	<u>100.0</u>

Generally, respondents recalled seeing the advertising in the "fall 1982" followed by "summer 1982". A significant number (15) of respondents noticed the advertising "before 1982".

QUESTION 12(a) Have you ever seen, read or heard the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" in a shopping mall display?

TABLE 22

RECALL OF SLOGAN OR SYMBOL IN MALL DISPLAYS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
No	207	63.5
Yes	44	13.5
Don't Know	1	0.3
Not Applicable	74	22.7
	<u>326</u>	<u>100.0</u>

The mall displays were noticed by only 13.5% of all respondents.

QUESTION 12(b) What do you recall about
the shopping mall display?

TABLE 23

MALL DISPLAY RECALL

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
N.B. Symbol Only	3	0.9
Slogan Only	1	0.3
Symbol and Multiple	2	0.6
Slogan and Multiple	12	3.7
Specific Products and Multiple	3	0.9
Multiple Background	1	0.3
Posters Only	2	0.6
Food Demonstrations Only	1	0.3
Specific Products Only	6	1.8
Recipes Only	2	0.6
Other	2	0.6
Don't Know	8	2.5
Not Applicable	282	86.5
Not Ascertained	1	0.3
	326	100.0

The slogan was recalled most often by respondents however the low number of responses to this question precludes one from placing much emphasis on the results.

QUESTION 12(c) When did you see the mall display?

TABLE 24

TIME RECALL OF MALL DISPLAY

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Before 1982	3	0.9
Early 1982	3	0.9
Spring 1982	2	0.6
Summer 1982	9	2.8
Fall 1982	15	4.6
Don't Know	9	2.8
Not Applicable	282	86.5
Not Ascertained	3	0.9
	<u>326</u>	<u>100.0</u>

Respondents recalled seeing the mall displays
in the fall (4.6%) and summer (2.8%) of 1982.

QUESTION 13 In what year were you born?

TABLE 25

RESPONDENT'S AGE

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
19 years or younger	3	0.9
20 - 29	65	19.9
30 - 39	88	27.0
40 - 49	44	13.5
50 - 59	41	12.6
60 - 69	57	17.5
over 70	25	7.7
Refusal	3	0.9
	326	100.0

The highest percentage of respondents were between the ages of 30 - 39 (27%) followed by 20 , 29 (19.9%). Only 3 persons refused to answer this question.

QUESTION 14 How many people, including yourself,
are living in your household?

TABLE 26

<u>SIZE OF HOUSEHOLD</u>		
<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
One Member	49	15.0
Two Members	90	27.6
Three Members	47	14.4
Four Members	76	23.3
Five Members	42	12.9
Six Members	15	4.6
More Than Six	7	2.1
	<u>326</u>	<u>100.0</u>

The highest percentage of respondents were from households having two members (27.6%) followed by households with four members (23.3%).

QUESTION 15 What is the highest grade or level
of education that you have completed?

TABLE 27

RESPONDENT'S EDUCATION LEVEL

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Some Grade School	66	20.2
Grades 1 - 9 Complete	41	12.6
Some High School	69	21.2
High School Graduate	85	26.1
Some University	22	6.7
University Graduate	20	6.1
Some Post Graduate Work	2	0.6
Post Graduate Degree	8	2.5
Refusal	3	0.9
Other	10	3.1
	326	100.0

Respondents with some high school or high school graduation made up 47.3% of the total sample, while 20.2% had less than a grade 9 education. Only 3 persons refused to answer this question.

QUESTION 16 What language do you normally speak at home?

TABLE 28

RESPONDENT'S LANGUAGE

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
French	95	29.1
English	211	64.7
French and English	18	5.5
Other	2	0.6
	326	100.0

Of the total number of respondents 64.7% were English and 29.1% were French.

- QUESTION 17(a) In 1981 was your family, that is the total income of all wage earners, over or under \$20,000....
- (b) ...over or under \$14,000
- (c) ...over or under \$30,000

TABLE 29

HOUSEHOLD INCOME

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Under \$14,000	93	28.5
\$14,000 - \$20,000	102	31.3
\$20,001 - \$30,000	67	20.6
\$30,001 +	32	9.8
Don't Know	16	4.9
Not Ascertained	3	0.9
Refusal	13	4.0
	326	100.0

The highest percentage of respondents (59.8%) had a total family income of \$20,000 or less while 20.6% of all respondents were in the \$20,000 - \$30,000 range.

QUESTION 18 Check sex.

TABLE 30

RESPONDENT'S SEX

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Male	53	16.3
Female	273	83.7
	<u>326</u>	<u>100.0</u>

TABLE 31

LOCATION OF RESPONDENTS

<u>CATEGORY</u>	<u>NUMBER OF RESPONDENTS</u>	<u>% OF TOTAL</u>
Newcastle	22	6.7
Edmundston	28	8.6
Campbellton	15	4.6
Woodstock	20	6.1
Fredericton	48	14.7
Bathurst	41	12.6
Moncton	73	22.4
Saint John	65	19.9
St. Stephen	14	4.3
	326	100

5.2 Crosstabulations

5.2.1 Market Segmentation By Age

TABLE 32

RELATIONSHIP BETWEEN AWARENESS OF THE SLOGAN

AND AGE OF RESPONDENTS

AWARE OF SLOGAN	19 OR YOUNGER							OVER 70	REFUSAL	TOTAL
		20-29	30-39	40-49	50-59	60-69				
No	0	15	30	17	21	31	14		2	130
	0	11.5	23.1	13.1	16.2	23.8	10.8		1.5	40.0
Yes	3	50	58	27	19	26	11		1	195
	1.5	25.6	29.7	13.8	9.7	13.3	5.6		0.5	60.0
TOTAL	3	65	88	44	40	57	25		3	325
	0.9	20.0	27.1	13.5	12.3	17.5	7.7		0.9	100.0

$$\chi^2 - 22.15$$

$$p - .0024$$

Number of missing observations = 1

The probability that a relationship exists is 99.76%.

Respondents who were 20 - 49 years of age showed the highest awareness of the slogan, particularly those in the 20 - 29 age category. Awareness of the slogan generally tends to decrease as age increases.

TABLE 33
RELATIONSHIP BETWEEN AWARENESS OF THE
N.B. GROWN SYMBOL AND AGE OF RESPONDENTS

AWARE OF SYMBOL	19 YEARS OR YOUNGER	AGE GROUPS					70 OR MORE	REFUSAL	TOTAL
		20-29	30-39	40-49	50-59	60-69			
No	1	13	21	13	15	26	12	2	103
	1.0	12.6	20.4	12.6	14.6	25.2	11.7	1.9	13.7
Yes	2	52	66	31	26	31	13	1	222
	0.9	23.4	29.7	14.0	11.7	14.0	5.9	0.5	68.3
TOTAL	3	65	87	44	41	57	25	3	325
	0.9	20.0	26.8	13.5	12.6	17.5	7.7	0.9	100.0

$$\chi^2 - 16.82 \quad p - .0186$$

Number of missing observations = 1

The probability that a relationship exists is 98.14%.

Respondents who were 20 - 49 years of age showed the highest awareness of the N.B. Grown symbol, although those who were 50 and over were more aware of the symbol than they were of the slogan. As with the slogan, awareness of the symbol tends to decrease as age increases.

TABLE 34

RELATIONSHIP BETWEEN AWARENESS OF

FOOD STORE ADVERTISING FOR N.B. AGRICULTURAL

FOOD PRODUCTS AND AGE OF RESPONDENT

<u>AWARE OF FOOD STORE ADVERTISING</u>	<u>19 YEARS OR YOUNGER</u>	<u>70 OR MORE</u>					<u>REFUSAL</u>	<u>TOTAL</u>
		<u>20-29</u>	<u>30-39</u>	<u>40-49</u>	<u>50-59</u>	<u>60-69</u>		
No	2	17	23	16	9	20	1	97
	2.1	17.5	23.7	16.5	9.3	20.6	1.0	38.8
Yes	1	43	49	21	20	13	0	153
	0.7	28.1	32.0	13.7	13.1	8.5	0	61.2
TOTAL	3	60	72	37	29	33	1	250
	1.2	24.0	28.8	14.8	11.6	13.2	0.4	100.0

$$\chi^2 - 17.24 \quad p - .0159$$

Number of missing observations = 76

The probability that a relationship exists is 98.41%.

Respondents who were 20 - 29 years of age showed the highest awareness of food store advertising followed by those in the 30 - 39 and 50 - 59 age categories. Respondents who were 60 and over were the least aware.

5.2.2 Market Segmentation By Education

TABLE 35

RELATIONSHIP BETWEEN AWARENESS OF ANY ADVERTISING FOR
NEW BRUNSWICK AGRICULTURAL FOOD PRODUCTS AND EDUCATION

LEVEL OF RESPONDENTS

AWARE OF ANY ADVERTISING	SOME GRADE SCHOOL		COMPLETED GRADE 9		SOME HIGH SCHOOL		COMPLETED HIGH SCHOOL		SOME UNIV.		UNIV. GRAD.		SOME GRAD. WORK		GRAD. DEGREE		REFUSAL		OTHER		TOTAL	
No	30	19	28	22	8	6	0	0	0	2	117											
	25.6	16.2	23.9	18.8	6.8	5.1	0	0	0	1.7	37.0											
Yes	32	20	40	61	13	14	2	8	8	1	199											
	16.1	10.1	20.1	30.7	6.5	7.0	1.0	4.0	4.0	0.5	63.0											
TOTAL	62	39	68	83	21	20	2	8	8	3	316											
	19.6	12.3	21.5	26.3	6.6	6.3	0.6	2.5	2.5	0.9	100.0											

$$\chi^2 - 18.85 \quad p - .0265$$

Number of missing observations = 10

The probability that a relationship exists
is 97.35%.

Awareness of any advertising for New Brunswick agricultural food products tends to increase as education level of respondents increases. Respondents who had completed high school or had a university degree showed the highest level of awareness, while those with a grade 9 education or less were the least aware.

TABLE 36

RELATIONSHIP BETWEEN AWARENESS OF THE
SLOGAN AND EDUCATION LEVEL OF RESPONDENTS

<u>AWARE OF SLOGAN</u>	<u>SOME GRADE SCHOOL</u>	<u>COMPLETED GRADE 9</u>	<u>SOME HIGH SCHOOL</u>	<u>HIGH SCHOOL GRADUATE</u>	<u>SOME UNIV.</u>	<u>UNIV. GRAD.</u>	<u>SOME GRAD. WORK</u>	<u>GRAD. DEGREE</u>	<u>REFUSAL</u>	<u>OTHER</u>	<u>TOTAL</u>
No	43 33.1	28 21.5	23 17.7	24 18.5	5 3.8	3 2.3	0 0	2 1.5	0 0	2 1.5	130 40.0
Yes	22 11.3	13 6.7	46 23.6	61 31.3	17 8.7	17 8.7	2 1.0	6 3.1	3 1.5	8 4.1	195 60.0
TOTAL	65 20.0	41 12.6	69 21.2	85 26.2	22 6.8	20 6.2	2 0.6	8 2.5	3 0.9	10 3.1	325 100.0

$$\chi^2 - 52.07 \quad p - .0000$$

Number of missing observations = 1

The probability that a relationship exists
is 99.99%.

This table clearly shows that the higher the education level of respondents, the more likely they are to be aware of the slogan. Respondents who completed grade 9 or less were least aware of the slogan while respondents with some university or a university degree were the most aware.

TABLE 37
RELATIONSHIP BETWEEN AWARENESS OF THE N.B. GROWN SYMBOL
AND EDUCATION LEVEL OF RESPONDENTS

AWARE OF NB GROWN SYMBOL	SOME GRADE SCHOOL	COMPLETED GRADE 9	SOME HIGH SCHOOL	COMPLETED HIGH SCHOOL	SOME UNIV.	UNIV. GRAD.	SOME GRAD. WORK	GRAD. DEGREE	REFUSAL	OTHER	TOTAL
No	38 36.9	16 15.5	19 18.4	20 19.4	3 2.9	2 1.9	0 0	2 1.9	1 1.0	2 1.9	103 31.7
Yes	28 12.6	25 11.3	49 22.1	65 29.3	14 8.6	18 8.1	2 0.9	6 2.7	2 0.9	8 3.6	222 68.3
TOTAL	66 20.3	41 12.6	68 20.9	85 26.2	22 6.8	20 6.2	2 0.6	8 2.5	3 0.9	10 3.1	325 100.0

$\chi^2 - 33.89$ $p - .0001$
Number of missing observations = 1
The probability that a relationship exists
is 99.99%.

As in the case of the slogan, it is apparent that awareness of the N.B. Grown symbol increases as the education level of respondents increases. Respondents who have completed grade 9 or less are the least aware of the symbol while those having some university or a university degree are the most aware.

TABLE 38

RELATIONSHIP BETWEEN RECALL OF SYMBOL OR
SLOGAN ON TELEVISION AND EDUCATION LEVEL
OF RESPONDENTS

RECALL SYMBOL OR SLOGAN ON T.V.	SOME GRADE SCHOOL	COMPLETED GRADES 1-9	SOME HIGH SCHOOL	HIGH SCHOOL GRAD.	SOME UNIV.	UNIV. GRAD.	SOME GRAD. WORD	GRAD. DEGREE	REFUSAL	OTHER	TOTAL
No	5 14.3	10 28.6	8 22.9	8 22.9	2 5.7	0 0	0 0	0 0	0 0	2 5.7	35 13.9
Yes	31 14.4	18 8.3	48 22.2	64 29.6	18 8.3	19 8.8	1 0.5	7 3.2	3 1.4	7 3.2	216 86.1
TOTAL	36 14.3	28 11.2	56 22.3	72 28.7	20 8.0	19 7.6	1 0.4	7 2.8	3 1.2	9 3.6	251 100.0

$$\chi^2 - 17.18$$

$$p - .0460$$

Number of missing observations = 75

The probability that a relationship exists
is 95.4%.

Recall of the symbol or slogan on television was generally high, although it did tend to increase somewhat as education level increased. Of the 251 respondents, 86.1% answered affirmatively. The lowest recall was among those who had completed grades 1 - 9 (64.3%) 100% of those respondents with a university degree recalled seeing the slogan or symbol or television.

TABLE 39

RELATIONSHIP BETWEEN QUALITY OPINION OF NEW BRUNSWICK
AGRICULTURAL FOOD PRODUCTS AND EDUCATION LEVEL OF RESPONDENTS

QUALITY OPINION	SOME GRADE SCHOOL	COMPLETED GRADE 9	SOME HIGH SCHOOL	COMPLETED HIGH SCHOOL	SOME UNIV. GRAD.	SOME GRAD. WORK	GRAD. DEGREE	REFUSAL	OTHER	TOTAL
Much Better	17	10	11	25	5	1	1	0	3	78
	21.8	12.8	14.1	32.1	6.4	1.3	1.3	0	3.8	27.0
Slightly Better	14	10	22	22	5	1	3	1	4	88
	15.9	11.4	25.0	25.0	6.8	1.1	3.4	1.1	4.5	30.4
About the Same	25	17	28	24	10	0	2	0	1	115
	21.7	14.8	24.3	20.9	8.7	0	1.7	0	0.9	39.8
Slightly Poorer	1	1	0	2	0	0	0	1	0	5
	20.0	20.0	0	40.0	0	0	0	20.0	0	1.7
Much Poorer	0	1	0	0	1	0	0	0	0	2
	0	50.0	0	0	50.0	0	0	0	0	.7
Other	0	0	0	0	0	0	1	0	0	1
	0	0	0	0	0	0	100.0	0	0	.3
TOTAL	57	39	61	73	21	19	7	2	8	289
	19.7	13.5	21.1	25.3	7.3	6.6	2.4	0.7	2.8	100.0

$\chi^2 - 93.41$

$p - .0000$

Number of missing observations = 37

The probability that a relationship exists
is 99.99%.

Generally respondents had a high opinion of the quality of N.B. agricultural food products regardless of their education level. Those respondents who completed high school had the highest opinion with 64.4% of respondents in this category mentioning that N.B. products were "slightly better than most" to "much better than most".

Of the total number of respondents who answered this question (289), 97.2% felt that N.B. agricultural food products were "about the same as most" to "much better than most".

5.2.3 Market Segmentation By Language

TABLE 40

RELATIONSHIP BETWEEN SUPPLY OPINION OF NEW
BRUNSWICK AGRICULTURAL FOOD PRODUCTS AND

<u>SUPPLY OPINION</u>	<u>LANGUAGE OF RESPONDENTS</u>			
	<u>FRENCH</u>	<u>ENGLISH</u>	<u>FRENCH AND ENGLISH</u>	<u>OTHER</u>
Most of Year	11	58	3	1
	15.1	79.5	4.1	1.4
Half of Year	20	63	4	0
	23.0	72.4	4.6	0
Only a few Months	42	45	10	1
	42.9	45.9	10.2	1.0
Only a few Weeks	6	3	0	0
	66.7	33.3	0	0
Other	2	6	1	0
	22.2	66.7	11.1	0
TOTAL	81	175	18	2
	29.3	63.4	6.5	0.7

$\chi^2 - 32.25$ $p - .0013$
Number of missing observations = 50

The probability that a relationship exists is 99.87%.

English respondents had a higher opinion of the supply of N.B. agricultural food products than did the French. Over half (51.9%) of the 51 French respondents to this question felt N.P. products were only available for a few months. Of the 175 English respondents 69.1% felt that N.B. agricultural food products were available "half of the year" to "most of the year".

TABLE 41
RELATIONSHIP BETWEEN AWARENESS OF N.B. GROWN
SYMBOL AND LANGUAGE OF RESPONDENTS

<u>AWARE OF</u> <u>NB GROWN</u> <u>SYMBOL</u>	<u>FRENCH</u>	<u>ENGLISH</u>	<u>FRINCH</u> <u>AND</u> <u>ENGLISH</u>	<u>OTHER</u>	<u>TOTAL</u>
No	37 35.9	57 55.3	9 8.7	0 0	103 31.7
Yes	58 26.1	153 68.9	9 4.1	2 0.9	222 68.3
TOTAL	95 29.2	210 64.6	18 5.5	2 0.6	325 100.0

$$\chi^2 - 8.03 \quad p - .0453$$

Number of missing observations = 1
The probability that a relationship exists
is 95.47%.

English speaking respondents were somewhat more aware of the N.B. Grown symbol than were the French. Of the 95 French respondents 58 (61.1%) were aware of the symbol compared to 153 (72.9%) of the 210 English respondents.

TABLE 42
RELATIONSHIP BETWEEN AWARENESS OF SLOGAN
AND LANGUAGE OF RESPONDENTS

<u>AWARE OF SLOGAN</u>	<u>FRENCH</u>	<u>ENGLISH</u>	<u>ENGLISH AND FRENCH</u>	<u>OTHER</u>	<u>TOTAL</u>
No	58 44.6	60 46.2	12 9.2	0 0	130 40.0
Yes	36 18.5	151 77.4	6 3.1	2 1.0	195 60.0
TOTAL	94 28.9	211 64.9	18 5.5	2 0.6	325 100.0

$\chi^2 - 52.07$

$p - .0000$

Number of missing observations = 1

The probability that a relationship exists
is 99.99%

English respondents showed a much higher awareness of the slogan than did the French. Of the 211 English respondents 151 (71.5%) were aware of the slogan compared to 36 (38.3%) of the 94 French respondents.

5.2.4 Market Segmentation By Income

TABLE 43

RELATIONSHIP BETWEEN AWARENESS OF ANY ADVERTISING
FOR NEW BRUNSWICK AGRICULTURAL FOOD PRODUCTS AND

RESPONDENTS TOTAL HOUSEHOLD INCOME

AWARE OF ANY ADVERTISING	LESS THAN \$14,000		\$14,000 - \$20,000		\$20,001 - \$30,000		MORE THAN \$30,000		TOTAL
NO	42		29		20		5		96
	43.8		30.2		20.8		5.2		33.8
Yes	47		69		45		27		188
	25.0		36.7		23.9		14.4		66.2
TOTAL	89		98		65		32		284
	31.3		34.5		22.9		11.3		100.0

$\chi^2 - 12.89$ $p - .0049$
 Number of missing observations = 42
 The probability that a relationship exists
 is 99.51%.

Respondents with a total household income of less than \$14,000 were least aware of any advertising for N.B. agricultural food products. The highest advertising awareness was among respondents with a household income of \$30,000 or more.

TABLE 44
RELATIONSHIP BETWEEN AWARENESS OF SLOGAN
AND RESPONDENTS TOTAL HOUSEHOLD INCOME

AWARE OF SLOGAN	LESS THAN \$14,000		\$14,000 - \$20,000		\$20,001 - \$30,000		OVER \$30,000		TOTAL
	No	Yes	No	Yes	No	Yes	No	Yes	
No	50 43.1	43 37.1	19 16.4	4 3.4	116 39.6				
Yes	43 24.3	59 33.3	47 26.6	28 15.8	177 60.4				
TOTAL	93 31.7	102 34.8	66 22.5	32 10.9	293 100.0				

$$\chi^2 - 21.13 \quad p - .0001$$

Number of missing observations = 33

The probability that a relationship exists is 99.99%.

This table shows a very clear relationship between slogan awareness and income of respondents. Slogan awareness increases significantly as the income of respondents increases. Only 43 of the 93 respondents having a household income of less than \$14,000 were aware of the slogan compared to 28% of the 32 respondents with an income of over \$30,000.

TABLE 45
RELATIONSHIP BETWEEN AWARENESS OF NB GROWN SYMBOL
AND RESPONDENTS TOTAL HOUSEHOLD INCOME

AWARE OF SYMBOL	LESS THAN \$14,000		\$14,000 - \$20,000		\$20,001 - \$30,000		MORE THAN \$30,000		TOTAL
No	42	27	16	7					92
	45.7	29.3	17.4	7.6					31.4
Yes	51	74	51	25					201
	25.4	36.8	25.4	12.4					68.6
TOTAL	93	101	67	32					293
	31.7	34.5	22.9	10.9					100.0

$$\chi^2 - 12.30 \quad p - .0064$$

Number of missing observations = 33

The probability that a relationship exists
is 99.36%.

The level of awareness of the N.B. Grown symbol increases consistently as the total household income increases. Only 51 or 25.4% of respondents having an income under \$14,000 were aware of the symbol compared to 25 or 78.1% of the respondents with an income over \$30,000.

5.2.5 Market Segmentation By Area

TABLE 46

RELATIONSHIP BETWEEN AREA OF THE PROVINCE AND PREFERRED
AGRICULTURAL FOOD PRODUCING AREA

<u>AREA OF PROVINCE</u>	<u>LOCAL OR N.B.</u>	<u>P.E.I.</u>	<u>ATLANTIC</u>	<u>CANADIAN</u>	<u>OTHER</u>	<u>TOTAL</u>
Newcastle	9 90.0	0 0	1 10.0	0 0	0 0	10 6.2
Edmundston	9 81.8	2 18.2	0 0	0 0	0 0	11 6.8
Campbellton	6 66.7	1 11.1	1 11.1	1 11.1	0 0	9 5.6
Woodstock	12 92.3	0 0	1 7.7	0 0	0 0	13 8.0
Fredericton	25 83.3	2 6.7	2 6.7	0 0	1 3.3	30 18.5
Bathurst	11 78.6	2 14.3	1 7.1	0 0	0 2.9	14 21.6
Moncton	29 82.9	0 0	5 14.3	0 0	1 2.9	35 21.6
Saint John	26 76.5	1 2.9	4 11.8	0 0	3 8.8	34 21.0
St. Stephen	4 66.7	0 0	0 0	0 0	2 33.3	6 3.7
TOTAL	131 80.9	8 4.9	15 9.3	1 0.6	7 4.3	162 100.0

$$x^2 - 47.62$$

$$p - .0373$$

Number of missing observations = 164

The probability that a relationship exists is 95.27%.

Generally, there is a strong preference for N.B. agricultural food products throughout the province. Respondents in Woodstock (92.3%) and Newcastle (90.0%) showed the strongest preference for N.B. products while St. Stephen (66.7%) and Campbellton (66.7%)

had the lowest preference.

A total of 15 or 9.3% of all respondents mentioned the Atlantic region as there preferred producing area, the majority of these responses were recorded in Moncton and Saint John.

TABLE 47

RELATIONSHIP BETWEEN AREA OF PROVINCE AND RESPONDENT
PRICE OPINION

AREA OF PROVINCE	MUCH HIGHER	A LITTLE HIGHER	ABOUT THE SAME	LITTLE LOWER	MUCH LOWER	OTHER	TOTAL
Newcastle	1 4.8	4 19.0	12 57.1	4 19.0	0 0	0 0	21 8.0
Edmundston	2 8.7	5 21.7	14 60.9	2 8.7	0 0	0 0	23 8.8
Campbellton	0 0	4 33.3	6 50.0	2 16.7	0 0	0 0	12 4.6
Woodstock	2 13.3	1 6.7	9 60.0	2 13.3	0 0	1 6.7	15 5.7
Fredericton	0 0	6 14.6	23 56.1	10 24.4	2 4.9	0 0	41 15.7
Bathurst	0 0	1 3.3	16 53.3	10 33.3	1 3.3	2 6.7	30 11.5
Moncton	1 1.5	5 7.7	47 72.3	5 7.7	0 0	7 10.8	65 24.9
Saint John	3 6.4	8 17.0	23 48.9	12 25.5	1 2.1	0 0	47 18.0
St. Stephen	0 0	2 28.6	4 57.1	1 14.3	0 0	0 0	7 2.7
TOTAL	9 3.4	36 13.8	154 59.0	48 18.4	4 1.5	10 3.8	261 100.0

$$\chi^2 - 57.39 \quad p - .0367$$

Number of missing observations = 65

The probability that a relationship exists is 96.33%.

The majority of respondents (59%) felt that prices for N.B. agricultural food were "about the same" as products from other producing areas. Respondents from Edmundston, Campbellton and St. Stephen had the most negative perceptions of the price of N.B. products, while respondents in Bathurst and Fredericton showed the most positive opinions.

TABLE 48

RELATIONSHIP BETWEEN AREA OF PROVINCE AND RESPONDENT
SUPPLY OPINION

AREA OF PROVINCE	AVAILABLE MOST OF YEAR	AVAILABLE HALF OF YEAR	ONLY FOR A FEW MONTHS	ONLY FOR A FEW WEEKS	OTHER	TOTAL
Newcastle	6 33.3	3 16.7	8 44.4	1 5.6	0 0	18 6.5
Edmundston	4 16.0	4 16.0	12 48.0	3 12.0	2 8.0	25 9.1
Campbellton	4 26.7	3 20.0	7 46.7	1 6.7	0 0	14 5.4
Woodstock	6 31.6	6 31.6	3 15.8	0 0	4 21.1	19 6.9
Fredericton	15 36.6	14 34.1	12 29.3	0 0	0 0	4.1 14.9
Bathurst	9 27.3	8 24.2	13 39.4	3 9.1	0 0	33 12.0
Moncton	8 12.5	31 48.4	22 34.4	0 0	3 4.7	64 23.2
Saint John	16 30.8	17 32.7	18 34.6	1 1.9	0 0	52 18.8
St. Stephen	5 55.6	1 11.1	3 33.3	0 0	0 0	9 3.3
TOTAL	73 26.4	87 31.5	98 35.5	9 3.3	9 3.3	276 100.0

$$\chi^2 - 68.10 \quad p - .0002$$

Number of missing observations = 50

The probability that a relationship exists
is 99.98%.

Respondents from Fredericton had the highest opinion of the supply of N.B. agricultural food products, 70.7% of respondents in this area felt the products were "available half of the year" to "most of the year". The majority of respondents in Edmundston and Campbellton felt that N.B. products were "available only for a few weeks" to "a few months".

TABLE 49

RELATIONSHIP BETWEEN AREA OF PROVINCE AND AWARENESS OF SLOGAN

<u>AREA OF PROVINCE</u>	<u>NO</u>	<u>YES</u>	<u>TOTAL</u>
Newcastle	14 63.6	8 36.4	22 6.8
Edmundston	16 57.1	12 42.9	28 8.6
Campbellton	7 46.7	8 53.3	15 4.6
Woodstock	9 45.0	11 55.0	20 6.2
Fredericton	10 20.8	38 79.2	48 14.8
Bathurst	21 52.5	19 47.5	40 12.3
Moncton	34 46.6	39 53.4	73 22.5
Saint John	17 26.2	48 73.8	65 20.0
St. Stephen	2 14.3	12 85.7	14 4.3
TOTAL	130 40.0	195 60.0	325 100.0

$$\chi^2 - 29.35 \quad p - .0003$$

Number of missing observations = 1

The probability that a relationship exists is 99.97%.

Respondents in St. Stephen (85.7%), Fredericton (79.2%) and Saint John (73.8%) indicated a high awareness of the slogan. The lowest slogan awareness was recorded in Newcastle (36.4%) Edmundston (42.9%) and Bathurst (47.5%).

TABLE 50

RELATIONSHIP BETWEEN AREA OF PROVINCE AND TELEVISION
ADVERTISING RECALL

AREA OF PROVINCE	NB GROWN SYMBOL ONLY	SLOGAN ONLY	SYMBOL AND SLOGAN ONLY	SYMBOL AND MULTIPLE	VISUALS ONLY	MUSIC ONLY	SPECIFIC PRODUCTS ONLY	OTHER	TOTAL
22 Newcastle	4 25.0	0 0	0 0	6 37.5	0 0	1 6.3	3 18.8	2 12.5	16 9.3
26 Edmundston	6 35.3	0 0	0 0	6 35.3	1 5.9	1 5.9	2 11.8	1 5.9	17 9.9
15 Campbellton	1 16.7	0 0	0 0	0 0	0 0	2 33.3	3 50.0	0 0	6 3.5
20 Woodstock	2 22.2	0 0	0 0	4 44.4	0 0	1 11.1	0 0	2 22.2	9 5.2
48 Fredericton	4 14.8	1 3.7	2 7.4	7 25.9	5 18.5	1 3.7	2 7.4	5 18.5	27 15.7
Bathurst	7 41.2	0 0	0 0	2 11.8	1 5.9	0 0	6 35.3	1 5.9	17 9.9
23 Moncton	13 27.7	0 0	0 0	28 59.6	0 0	2 4.3	0 0	4 8.5	47 27.3
65 Saint John	9 32.1	1 3.6	1 3.6	4 14.3	4 14.3	1 3.6	3 10.7	5 17.9	28 16.3
14 St. Stephen	1 20.0	0 0	0 0	0 0	1 20.0	1 20.0	1 20.0	1 20.0	5 2.9
TOTAL	47 27.3	2 1.2	3 1.7	57 33.1	12 7.0	10 5.8	20.0 11.6	21 12.2	172 100.0

$\chi^2 - 130.21$

$p - .0419$

Number of missing observations = 154

The probability that a relationship exists
is 95.81%.

The symbol, either alone or in combination with some other characteristic of the T.V. advertising tested well throughout the province. The exceptions to this rule are the Campbellton and St. Stephen areas where only one respondent in each area recalled seeing the symbol.

It is interesting to note that specific products were mentioned frequently in Campbellton (50%) and Bathurst (35.3%).

The slogan did not test well in any area of the province, the highest recall of the slogan from the T.V. advertising was in Fredericton where only 11.1% of the respondents recalled it either alone or with some other characteristic of the advertising.

TABLE 51

RELATIONSHIP BETWEEN AREA OF PROVINCE AND TIME RECALL OF TELEVISION ADVERTISING

AREA OF PROVINCE	BEFORE 1982	EARLY 1982	SPRING 1982	SUMMER 1982	FALL 1982	OTHER	TOTAL
Newcastle	2 15.4	1 7.7	0 0	4 30.8	6 46.2	0 0	13 9.4
Edmundston	1 6.3	1 6.3	0 0	2 12.5	12 75.0	0 0	16 11.5
Campbellton	2 33.3	1 16.7	1 16.7	0 0	2 33.3	0 0	6 4.3
Woodstock	0 0	3 30.0	4 40.0	0 0	3 30.0	0 0	10 7.2
Fredericton	0 0	0 0	0 0	3 18.8	13 81.3	0 0	16 11.5
Bathurst	5 25.0	4 20.0	2 10.0	6 30.0	1 5.0	2 10.0	20 14.4
Moncton	9 23.1	5 12.8	6 15.4	5 12.8	14 35.9	0 0	39 28.1
Saint John	2 11.8	0 0	0 0	2 11.8	10 58.8	3 17.6	17 12.2
St. Stephen	0 0	0 0	0 0	0 0	2 100.0	0 0	2 1.4
Total	21 15.4	15 10.8	13 9.4	22 15.8	63 45.3	5 3.6	139

 $\chi^2 - 96.44$ $p - .0289$

Number of missing observations = 187

 The probability that a relationship exists
is 97.11%.

As mentioned previously on this report, respondents recalled seeing the T.V. advertising in the fall of 1982 most frequently, particularly in Fredericton (81.3%) Edmunston (75%) and Saint John (58.8%). A significant number of respondents in Newcastle (30.8%) and Bathurst (30%) noticed the advertising in the summer of 1982. In Woodstock 70% of respondents recalled seeing the advertising in the Spring 1982 or early 1982.

A relatively high percentage of respondents recalled seeing the advertising before 1982, particularly in Campbellton (33.3%), Bathurst (25%) and Moncton (23.1%).

TABLE 52

RELATIONSHIP BETWEEN AREA OF PROVINCE AND NEWSPAPER ADVERTISING RECALL

AREA OF PROVINCE	N.B. GROWN SYMBOL ONLY	SYMBOL AND SLOGAN ONLY	SLOGAN AND MULTIPLE	RECIPES ONLY	GRAPHICS ONLY	SPECIFIC PRODUCTS ONLY	OTHER	TOTAL
Newcastle	1 12.5	0 0	3 37.5	2 25.0	0 0	1 12.5	1 12.5	8 9.2
Edmundston	2 33.3	0 0	3 50.0	0 0	0 0	1 16.7	0 0	6 6.9
Campbellton	2 66.7	0 0	0 0	0 0	1 33.3	0 0	0 0	3 3.4
Woodstock	5 55.6	1 11.1	3 33.3	0 0	0 0	0 0	0 0	9 10.3
Fredericton	4 30.8	1 7.7	3 23.1	1 7.7	1 7.7	3 23.1	0 0	13 14.9
Bathurst	4 50.0	0 0	1 12.5	1 12.5	1 12.5	1 12.5	0 0	8 9.2
Moncton	8 27.6	0 0	18 62.1	0 0	0 0	1 3.4	2 6.8	29 33.3
Saint John	3 30.0	0 0	1 10.0	1 10.0	0 0	2 20.0	3 30.0	10 11.5
St. Stephen	0 0	0 0	0 0	0 0	1 100.0	0 0	0 0	1 1.1
TOTAL	27 33.3	2 2.3	32 36.8	5 5.7	4 4.6	9 10.3	6 6.9	87 100.0

$\chi^2 - 88.18$ $p - .0243$

Number of missing observations = 239
The probability that a relationship exists is 97.57%.

Recall of the slogan in newspaper advertising was highest in Moncton (62.1%) and Edmunston (50%). Recall of the N.B. Grown symbol was highest in Campbellton (66.7%) and Bathurst (50%). The low number of valid observations (87) prohibits one from placing much emphasis on the information contained in this table.

TABLE 53

RELATIONSHIP BETWEEN AREA OF PROVINCE AND TIME RECALL OF NEWSPAPER ADVERTISING

AREA OF PROVINCE	BEFORE 1982	EARLY 1982	SPRING 1982	SUMMER 1982	FALL 1982	TOTAL
Newcastle	1 14.3	0 0	0 0	5 71.4	1 14.3	7 9.2
Edmundston	1 20.0	0 0	0 0	1 20.0	3 60.0	5 6.6
Campbellton	1 25.0	0 0	1 25.0	1 25.0	1 25.0	4 5.3
Woodstock	0 0	3 30.0	1 10.0	3 30.0	3 30.0	10 13.2
Fredericton	0 0	0 0	0 0	3 30.0	7 70.0	10 13.2
Bathurst	0 0	0 0	2 28.6	5 71.4	0 0	7 9.2
Moncton	3 11.5	7 26.9	5 19.2	5 19.2	6 23.1	26 34.2
Saint John	0 0	0 0	0 0	1 14.3	6 85.7	7 9.2
St. Stephen	0 0	0 0	0 0	0 0	0 0	0 0
TOTAL	6 7.9	10 13.2	9 11.8	24 31.6	27 35.5	76 100.0

$$\chi^2 - 47.07 \quad p - .0135$$

Number of missing observations = 250
 The probability that a relationship exists
 is 98.65%.

In most areas of the province respondents recalled seeing the newspaper advertising in the fall or summer of 1982. Moncton is a notable exception, in this area 57.6% of the respondents recalled seeing the advertising in the spring of 1982 or earlier.

TABLE 54

RELATIONSHIP BETWEEN AREA OF PROVINCE AND AWARENESS OF FOOD STORE ADVERTISING

<u>AREA OF PROVINCE</u>	<u>NO</u>	<u>YES</u>	<u>TOTAL</u>
Newcastle	3 20.0	12 80.0	15 6.0
Edmundston	7 35.0	13 65.0	20 8.0
Campbellton	5 45.5	6 54.5	11 4.4
Woodstock	6 37.5	10 62.5	16 6.4
Fredericton	12 27.3	32 72.7	44 17.6
Bathurst	19 63.3	11 36.7	30 12.0
Moncton	18 36.0	32 64.0	50 20.0
Saint John	18 35.3	33 64.7	51 20.4
St. Stephen	9 69.2	4 30.8	13 5.2
TOTAL	97 38.8	153 61.2	250 100.0

$$\chi^2 - 18.14 \quad p - .0202$$

Number of missing observations = 76
The probability that a relationship exists
is 97.98%.

Awareness of the Food Store advertising was lowest in St. Stephen (30.8%) and Bathurst (36.7%). Areas where awareness of food store advertising was highest were in Newcastle (80%) and Fredericton (72.7%).

TABLE 55

RELATIONSHIP BETWEEN AREA OF PROVINCE AND FOOD STORE ADVERTISING RECALL

AREA OF PROVINCE	NB GROWN SYMBOL	SLOGAN ONLY	SYMBOL AND SLOGAN	SYMBOL AND MULTIPLE	SLOGAN AND MULTIPLE	SPECIFIC PRODUCTS ONLY	OTHER	TOTAL
Newcastle	1 8.3	0 0	0 0	1 8.3	8 66.7	0 0	2 16.7	12
Edmundston	2 15.4	0 0	0 0	0 0	6 46.2	1 7.7	4 30.8	13
Campbellton	1 16.7	0 0	0 0	0 0	1 16.7	2 33.3	2 33.3	6
Woodstock	1 10.0	0 0	0 0	1 10.0	3 30.0	2 20.0	3 30.0	10
Fredericton	10 31.3	1 3.1	1 3.1	1 3.1	10 31.3	7 21.9	2 6.3	32
Bathurst	4 36.4	0 0	0 0	0 0	3 27.3	2 18.2	2 18.2	11
Moncton	6 18.8	0 0	0 0	0 0	24 75.0	2 6.2	0 0	32
Saint John	7 21.2	0 0	2 6.1	0 0	9 27.3	8 24.2	7 21.2	33
St. Stephen	1 25.0	0 0	1 25.0	1 25.0	0 0	1 25.0	0 0	4
TOTAL	33 21.6	1 0.7	4 2.6	4 2.6	64 41.8	25 16.3	22 14.4	153 100.0

$$\chi^2 - 114.86$$

$$p - .0065$$

Number of missing observations = 173

The probability that a relationship exists is 99.35%.

As mentioned previously in this report, the slogan was the most recalled characteristic of the food store advertising. In Moncton 75% of the respondents recalled the "slogan and multiple" as did 66.7% of the respondents in the Newcastle area. The symbol did not achieve a high recall in any area of the province as part of the food store advertising.

TABLE 56

RELATIONSHIP BETWEEN AREA OF PROVINCE AND TIME RECALL OF FOOD STORE ADVERTISING

AREA OF PROVINCE	BEFORE 1982	EARLY 1982	SPRING 1982	SUMMER 1982	FALL 1982	OTHER	TOTAL
Newcastle	0 0	0 0	1 11.1	6 66.7	2 22.2	0 0	9 7.8
Edmundston	1 7.7	2 15.4	1 7.7	3 23.1	6 46.2	0 0	13 11.3
Campbellton	1 25.0	1 25.0	0 0	1 25.0	1 25.0	0 0	4 3.5
Woodstock	1 10.0	1 10.0	1 10.0	1 10.0	6 60.0	0 0	10 8.7
Fredericton	0 0	0 0	0 0	3 13.6	18 81.8	1 4.5	22 19.1
Bathurst	2 25.0	1 12.5	0 0	5 62.5	0 0	0 0	8 7.0
Moncton	1 3.2	10 32.3	6 19.4	7 22.6	7 22.6	0 0	31 27.0
Saint John	0 0	0 0	0 0	1 6.3	14 87.5	1 6.3	16 13.9
St. Stephen	0 0	0 0	0 0	0 0	1 50.0	1 50.0	2 1.7
TOTAL	6 5.2	15 13.0	9 7.8	27 23.5	55 47.8	3 2.6	115 100.0

$\chi^2 - 109.26$ $p - .0000$

Number of missing observations = 211

The probability that a relationship exists
is 99.99%.

As in the case of the other advertising media, respondents recalled seeing the food store advertising in the fall and summer of 1982.

Respondents in Fredericton (81.8%) and Saint John (87.5%) recalled seeing the advertising in fall 1982, while respondents in Newcastle (66.7%) and Bathurst (62.5%) mentioned summer 1982 more often.

Interestingly, 32.3% of the Moncton respondents recalled seeing the advertising early in 1982.

6.0 SUMMARY OF SURVEY RESULTS

This section of the report summarizes the results of the survey which were discussed in the previous section.

6.1 Frequency Tables

- . Approximately half of the respondents check to see where a product is produced before purchasing, of these most indicated that the area of origin influenced their choice.
- . Most of the respondents who indicated that where a product was produced made a difference in their choice named New Brunswick as their preferred producing area.
- . Approximately half of the respondents felt that New Brunswick agricultural food products were available half of the year to most of the year. A significant number of respondents felt that they were available for a few months or less.
- . The majority of respondents felt that N.B. agricultural food products were about the same or better in quality than products from other producing areas.
- . Respondents did not appear to perceive a significant difference between the price of N.B. agricultural food products and those from other producing areas.
- . A majority of respondents recalled seeing some advertising for N.B. agricultural food products and more respondents recalled the N.B. Grown Symbol (68.1%) than the slogan (59.8%).

- . A majority of respondents recalled seeing the television advertising and the most recalled characteristic of this advertising was the N.B. Grown Symbol. Most respondents did not recall the slogan from the television advertising, however a significant number did mention specific products. Respondents recalled seeing the television advertising in the fall of 1982 most often.
- . Radio advertising was recalled by a minority of respondents and specific products and music were the most recalled characteristics of this advertising. Respondents recalled hearing the radio advertising in the fall of 1982 or could not recall the specific time period.
- . Slightly more than one third of the respondents recalled the newspaper advertising. The slogan and symbol were the most frequently recalled characteristics of the advertising. Newspaper advertising was seen most often in the fall of 1982 and somewhat often in the summer of 1982.
- . Slightly less than half of the respondents recalled the food store advertising. The slogan was the most recalled characteristic of the advertising. A significant number of respondents recalled the symbol and specific products as well. Respondents noticed the advertising most frequently in the fall of 1982 and fairly often in the summer.

- . Mall displays had the lowest recall of all of the advertising vehicles used, a small percentage of respondents noticed the displays. The most frequently recalled characteristic of the advertising was the slogan. Respondents recalled seeing the displays in the fall of 1982 and to a lesser extent in the summer of 1982.

6.2 Market Segmentation by Age

- . Respondents who were 20 - 49 years of age showed the highest awareness of the slogan, particularly those between the ages of 20 - 29. Slogan awareness tends to decrease as age increases.
- . Respondents between the ages of 20 - 49 were the most aware of the symbol. As with the slogan, awareness of the symbol tends to decrease as age increases.
- . Respondents between the ages of 20 - 39 and 50 - 59 showed the highest awareness of food store advertising. Awareness of the advertising was lower among respondents who were 60 and over.

6.3 Market Segmentation by Education

- . Awareness of advertising for N.B. agricultural food products tends to increase as the education level of respondents increases.
- . The higher the education of respondents, the more likely they are to be aware of the slogan.
- . As in the case of the slogan, awareness of the N.B. Grown symbol tends to increase as the respondents education level increases.

- . Recall of the television advertising was generally high, although it did tend to increase somewhat as education level increased.
- . Generally, respondents had a high opinion of the quality of N.B. agricultural food products regardless of their education level. Respondents with the highest opinion were those who had completed high school.

6.4 Market Segmentation by Language

- . English respondents had a higher opinion of the supply of N.B. agricultural food products than did the French.
- . English respondents were somewhat more aware of the N.B. Grown symbol than were the French.
- . English respondents showed a much higher awareness of the slogan than did the French.

6.5 Market Segmentation by Household Income

- . Awareness of advertising for N.B. agricultural food products tends to increase as household incomes increase.
- . Awareness of the slogan also tends to increase as the household income of respondents increases.
- . The level of awareness of the N.B. Grown Symbol tends to increase as household incomes increase.

6.6 Market Segmentation by Area of the Province

- . There appears to be a strong preference for N.B. agricultural food products throughout the province, particularly in Woodstock and Newcastle. St. Stephen and Campbellton showed the lowest preference for N.B. products.
- . Respondents from Edmundston, Campbellton and St. Stephen had the most negative perceptions of the price of N.B. products while respondents in Bathurst and Fredericton showed the most positive opinions.
- . Respondents in Fredericton had the highest opinion of the supply of N.B. agricultural food products while respondents in Edmundston and Campbellton tend to feel that they are available only for a few weeks to a few months.
- . Respondents in St. Stephen, Fredericton and Saint John indicated a high awareness of the slogan. The lowest slogan awareness was recorded in Newcastle, Edmundston and Bathurst.
- . The N.B. Grown symbol was the most recalled characteristic of the television advertising in all areas of the province except Campbellton and St. Stephen. Recall of the slogan from the television advertising was low.
- . Respondents in most areas of the province recalled seeing the television advertising in the fall of 1982. A significant number of respondents in Newcastle and Bathurst noticed the advertising in the summer of 1982.

- . Recall of the slogan in the newspaper advertising was highest in Moncton and Edmundston while recall of the N.B. Grown symbol was highest in Campbellton and Bathurst.
- . In most areas of the province respondents recalled seeing the newspaper advertising in the fall or summer of 1982. Moncton is a notable exception, in this area 57.6% of the respondents recalled seeing the advertising in the spring or earlier.
- . Awareness of the food store advertising was lowest in St. Stephen and Bathurst. Areas where food store advertising awareness was highest were Newcastle and Fredericton.
- . The slogan was the most recalled characteristic of the food store advertising. In Moncton 75% of the respondents recalled the slogan and some other characteristic of the advertising as did 66.7% of the respondents in the Newcastle area. The symbol did not achieve a high recall in any area of the province as part of the food store advertising.
- . Respondents recalled seeing the food store advertising in the fall of 1982 and to a lesser extent in the summer of 1982. Most respondents in Fredericton and Saint John recalled seeing the advertising in the fall while those in Newcastle and Bathurst mentioned the summer most often. A significant number of Moncton respondents recalled seeing the advertising early in 1982.

7.0 CONCLUSIONS

This section attempts to outline the effectiveness of the N.B. Grown Promotion Program in reaching it's desired objectives. The specific points addressed are those which were outlined in the "scope" section of the terms of reference for this study.

7.1 Consumer Awareness of N.B. Grown Symbol

As mentioned previously in this report, a majority (68.1%) of the total number of respondents recalled having seen, read or heard the N.B. Grown Symbol. This can be considered a high response given the fact that the question was asked of each respondent only once and no "probes" were used. Also, it should be noted that there was virtually no confusion with the "Atlantic Canada Plus" symbol as was the case in a previous survey conducted in early 1981.

Television appears to have been the most effective medium for making consumers aware of the symbol. The target age group of persons between the ages of 20 and 49 were the most aware of the symbol, although it should be noted that consumers with a low education level, a low household income or who spoke French as their main language were less likely to have been aware of the symbol.

7.2 Consumer Awareness of the Slogan

Although the slogan did not achieve the same level of recall the symbol did, the response was still relatively high 59.8%. The difference in recall between these two characteristics of the advertising may be attributable to the prominence of the symbol in the television ads. There was a high recall of the slogan from food store advertising given the low reach of this type of promotional vehicle when compared to

a medium such as television.

As in the case of the symbol, recall of the slogan was highest among the target age group (20 - 49 years), particularly that segment between the ages of 20 - 29. Consumers with low incomes, a low education level or who spoke French as their main language are less likely to be aware of the slogan.

7.3 Consumer Attitudes Towards N.B. Agricultural Food Products

Among consumers in New Brunswick whose purchasing is influenced by where a product is produced the preference for New Brunswick agricultural products is high. There is, however, a significant percentage (48.8%) of consumers whose purchasing habits are not influenced by where a product is grown or produced.

The price and quality of N.B. agricultural food products are considered to be comparable to or better than products from other producing areas. Perceptions of the supply or availability of N.B. products are better among English than among French speaking consumers.

7.4 Buyer Behavior and Brand Loyalty

As mentioned in our firms proposal preceding this study, it is difficult if not impossible to determine the degree to which buyer behavior and brand loyalty has been influenced by the program within the context of this study. It would be possible, however, for the department to compare the information contained in this report to the results of previous surveys in an effort to determine the effect the advertising has had on consumer behavior. If possible, a review of provincial retail sales statistics for agricultural food products over the last three years, could also give some insight into the situation.

This report does contain valuable information on food buyers' current level of preference for N.B. agricultural food products, as well as their attitudes towards the price, quality and supply of N.B. products. This information is presented elsewhere in this report.

7.5 Relative Performance of the Media Used

Television advertising was the most recalled promotional vehicle of the advertising campaign. This medium was especially effective in making consumers aware of the N.B. Grown symbol. It should be noted that recall of this advertising tended to increase with education level of respondents. This may be related in some way to the characteristics of the viewing audience at the times the advertising was aired or, it may be that consumers with a higher education take notice of such advertising because they are aware of the economic importance to New Brunswick and the farmer of buying local products.

Radio advertising had a relatively low recall. It was recalled by a minority of respondents and primarily in the fall of 1982. Music and specific products were the most frequently recalled characteristics of the advertising. Radio advertising was not a major component of the media mix used during the campaign which would explain the low recall.

Of the media used in the campaign, newspaper advertising places third in terms of respondent recall. The slogan

and symbol were the most recalled characteristics of this form of advertising.

The food store advertising had a high recall in most areas of the province except St. Stephen and Bathurst. This medium was particularly effective in getting the slogan across to the consumer. Of the various media used, food store advertising placed second in terms of respondent recall.

Mall displays were the least recalled form of promotion used in the campaign. The displays appear to have had little success in reaching the consumer. Of course, if the displays were limited in number a relatively low recall is to be expected.

Only the results of this survey have been used to determine the relative success of each medium. The relatively poor performance of radio and mall displays may be due in part to the amount of dollars spent in these media.

APPENDIX I

ENGLISH AND FRENCH QUESTIONNAIRES

NEW BRUNSWICK DEPARTMENT OF AGRICULTURE
AND RURAL DEVELOPMENT

"N.B. GROWN" ADVERTISING EFFECTIVENESS STUDY

PHONE # _____
DIRECTORY _____

Hello. Is this (STATE PHONE NUMBER DIALED,
IF ANSWER IS NO: I'm sorry to have
bothered you. HANG UP.)

My name is _____ of Clendenning
Associates, a marketing research company.
We are conducting a residential survey on
agricultural food products, that is food
produced, grown or raised on a farm. The
results of this survey will be used by
people involved in agriculture to improve
their present marketing and advertising
programs. All of your answers will be kept
completely confidential.

Are you the person who does most of the food buying
for your household?:

YES _____
NO _____ May I speak with that person?

WHEN SELECTED
PERSONS ANSWERS,
REPEAT INTRO-
DUCTION AND
START INTERVIEW

YES
NO
↓
IF THE SELECTED PERSON
IS NOT AVAILABLE, ASK
WHEN WOULD BE A GOOD
TIME TO CALL BACK AND
RECORD THE RESPONSE ON
YOUR FILE CARD. THANK
THE PERSON YOU ARE TALKING
TO AND HANG UP.

(START INTERVIEW)

The questions I need to ask should take only 5 or 6 minutes.
But before starting them, I want to mention that I would be
happy to answer any questions you might have about the survey
either now or later. Okay?

QUESTIONS OR COMMENTS:

SECTION ONE

I would like to begin by asking you about your buying habits for agricultural food products; again, this can be any food which is produced, grown or raised on a farm.

1. Before you purchase agricultural food products, do you generally look to see where they are grown or produced?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

2. Does this make a difference in your choice?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

3. Which producing or growing area or province do you prefer?

LOCAL OR N.B.....04
PRINCE EDWARD ISLAND...05
ATLANTIC OR MARITIME...06
CANADIAN.....07
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

4. (a) When compared to products from other areas or provinces do you consider the price of New Brunswick Agricultural Food Products to be: much higher than most, slightly higher than most, about the same, slightly lower than most or much lower than most.
(REPEAT CATEGORIES IF NECESSARY.)

MUCH HIGHER THAN MOST.....04
A LITTLE HIGHER THAN MOST.....05
ABOUT THE SAME.....06
A LITTLE LOWER THAN MOST.....07
MUCH LOWER THAN MOST.....08
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

SECTION ONE

I would like to begin by asking you about your buying habits for agricultural food products; again, this can be any food which is produced, grown or raised on a farm.

1. Before you purchase agricultural food products, do you generally look to see where they are grown or produced?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

2. Does this make a difference in your choice?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

3. Which producing or growing area or province do you prefer?

LOCAL OR N.B.....04
PRINCE EDWARD ISLAND...05
ATLANTIC OR MARITIME...06
CANADIAN.....07
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

- 4.(a)When compared to products from other areas or provinces do you consider the price of New Brunswick Agricultural Food Products to be: much higher than most, slightly higher than most, about the same, slightly lower than most or much lower than most.
(REPEAT CATEGORIES IF NECESSARY.)

MUCH HIGHER THAN MOST.....04
A LITTLE HIGHER THAN MOST.....05
ABOUT THE SAME.....06
A LITTLE LOWER THAN MOST.....07
MUCH LOWER THAN MOST.....08
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

- 4.(b)What is your opinion of the supply, that is the availability of New Brunswick Agricultural Food Products? Would you say that they are available: most of the year, about half of the year, only for a few months or only for a few weeks? (REPEAT CATEGORIES IF NECESSARY)

MOST OF THE YEAR.....04
ABOUT HALF OF THE YEAR....05
ONLY FOR A FEW MONTHS.....06
ONLY FOR A FEW WEEKS.....07
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

- (c)What is your opinion of the quality of New Brunswick Agricultural Food Products compared to the quality of products from other producing areas? Would you say that they are: much better in quality, slightly better in quality, about the same, slightly poorer in quality or much poorer in quality? (REPEAT CATEGORIES IF NECESSARY)

MUCH BETTER IN QUALITY.....04
SLIGHTLY BETTER IN QUALITY..05
ABOUT THE SAME.....06
SLIGHTLY POORER IN QUALITY..07
MUCH POORER IN QUALITY.....08
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

SECTION TWO

Now I have a few questions about the advertising of agricultural food products which are produced, raised or grown on a farm.

5. Have you ever seen, read or heard any advertising for New Brunswick Agricultural Food Products?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

6. Have you ever seen, read or heard the slogan or phrase "Our Best Belongs To You"?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

7. Have you ever seen, read or heard the symbol or trademark "N.B. Grown"?

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

IF THE RESPONDENT HAS ANSWERED NO TO BOTH QUESTIONS 6 and 7,
GO TO SECTION THREE ON PAGE 9

- 8.(a) Have you ever seen, read or heard the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" on the television?

IF NO GO
TO QUESTION 9

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

- (b) What do you recall about the television advertising?

N.B. GROWN SYMBOL.....04
SLOGAN.....05
WORDING.....06
VISUALS.....07
MUSIC.....08
SPECIFIC PRODUCTS.....09
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

RECORD ANY SPECIFIC COMMENTS
THE RESPONDENT MAY MAKE ON
THE ADVERTISING _____

(c) When did you notice the television advertising?

BEFORE 1982.....04
EARLY 1982.....05
(Jan.,Feb.,Mar)
SPRING 1982.....06
(April,May,June)
SUMMER 1982.....07
(July,August)
FALL 1982.....08
(Sept.,Oct.,Nov.)
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

9.(a) Have you ever heard the slogans or symbols
"N.B. GROWN" or "Our Best Belongs To You"
on the radio?

IF NO, GO TO
QUESTION 10

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

(b) What do you recall about the radio advertising?

N.B. GROWN SYMBOL....04
SLOGAN.....05
WORDING.....06
MUSIC.....07
SPECIFIC PRODUCTS....08
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

RECORD ANY SPECIFIC COMMENTS THE
RESPONDENT MAY MAKE ON THE ADVERTISING

(c) When did you hear the radio advertising?

BEFORE 1982.....04
EARLY 1982.....05
(Jan.,Feb.,Mar.)
SPRING 1982.....06
(April,May,June)
SUMMER 1982.....07
(July,August)
FALL 1982.....08
(Sept.,Oct.,Nov.)
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

10. (a) Have you ever seen or read the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" in the newspaper?

IF NO, GO TO
QUESTION 11

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

(b) What do you recall about the newspaper advertising?

N.B. GROWN SYMBOL.....04
SLOGAN.....05
WORDING.....06
RECIPES.....07
SPECIFIC PRODUCTS.....08
GRAPHICS.....09
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

RECORD ANY SPECIFIC COMMENTS THE
RESPONDENT MAY MAKE ON THE ADVERTISING

(c) When did you see the newspaper advertising?

BEFORE 1982.....04
EARLY 1982.....05
(Jan., Feb., Mar.)
SPRING 1982.....06
(April, May, June)
SUMMER 1982.....07
(July, August)
FALL 1982.....08
(Sept., Oct., Nov.)
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

11.(a) Have you ever seen or read the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" in food stores?

IF NO, GO TO
QUESTION 12

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

(b) What do you recall about the food store advertising?

N.B. GROWN SYMBOL.....04
SLOGAN.....05
POSTERS.....06
PRICE CARDS.....07
SPECIFIC PRODUCTS.....08
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

RECORD ANY SPECIFIC COMMENTS THE
RESPONDENT MAY MAKE ABOUT THE
ADVERTISING _____

(c) When did you see the food store advertising?

BEFORE 1982.....04
EARLY 1982.....05
(Jan., Feb., Mar.)
SPRING 1982.....06
(April, May, June)
SUMMER 1982.....07
(July, August)
FALL 1982.....08
(Sept., Oct., Nov.)
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

12.(a) Have you ever seen, read or heard the slogans or symbols "N.B. Grown" or "Our Best Belongs to You" in a shopping mall display?

IF NO, GO TO
SECTION THREE

NO.....01
YES.....02
DON'T KNOW.....66
NOT APPLICABLE...77
NOT ASCERTAINED..88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

(b) What do you recall about the shopping mall display?

N.B. GROWN SYMBOL.....04
SLOGAN.....05
POSTERS.....06
FOOD DEMONSTRATION.....07
CONTEST DRAWINGS.....08
RECIPES.....09
SPECIFIC PRODUCTS.....10
MUSIC.....11
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

RECORD ANY SPECIFIC COMMENTS THE
RESPONDENT MAY MAKE ABOUT THE
DISPLAY _____

(c) When did you see the mall display?

BEFORE 1982.....04
EARLY 1982.....05
(Jan.,Feb.,Mar.)
SPRING 1982.....06
(April,May,June)
SUMMER 1982.....07
(July, August)
FALL 1982.....08
(Sept.,Oct.,Nov.)
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

SECTION THREE

Finally, a few questions about yourself to help interpret the results of this survey. This information will be kept completely confidential.

13. In what year were you born?

1963 - 82.....04
1953 - 62.....05
1943 - 52.....06
1933 - 42.....07
1923 - 32.....08
1913 - 22.....09
1912 OR EARLIER.....10
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

14. How many people, including yourself, are living in your household?

1 MEMBER.....04
2 MEMBERS.....05
3 MEMBERS.....06
4 MEMBERS.....07
5 MEMBERS.....08
6 MEMBERS.....09
MORE.....10
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

15. What is the highest grade or level of education that you have completed?

NO FORMAL EDUCATION.....04
SOME GRADE SCHOOL.....05
COMPLETED GRADE SCHOOL (1-9).....06
SOME HIGH SCHOOL.....07
COMPLETED HIGH SCHOOL.....08
SOME UNIVERSITY.....09
COMPLETED UNIVERSITY.....10
SOME GRADUATE WORK.....11
A GRADUATE DEGREE.....12
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

16. What language do you normally speak at home?
(IF HESITANT: Is it French, English or other?)

FRENCH.....04
ENGLISH.....05
DON'T KNOW.....66
NOT APPLICABLE.....77
NOT ASCERTAINED.....88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

17. In 1961 was your family income, that is the total income of all wage earners, over or under \$20,000?

OVER \$20,000.....04
UNDER \$20,000.....05
DON'T KNOW.....66
NOT APPLICABLE....77
NOT ASCERTAINED...88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

17. (a) Would it be over or under \$14,000?

OVER \$14,000.....06
UNDER \$14,000.....07
DON'T KNOW.....66
NOT APPLICABLE....77
NOT ASCERTAINED...88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

17. (b) Would it be over or under \$30,000?

OVER \$30,000.....08
UNDER \$30,000.....09
DON'T KNOW.....66
NOT APPLICABLE....77
NOT ASCERTAINED...88
REFUSAL.....99
OTHER.....03
(SPECIFY _____)

18. Thank you very much for your time and cooperation.

-
19. CHECK SEX: MALE.....1
FEMALE....2

INTERVIEWER: _____

DATE: _____

MINISTÈRE DE L'AGRICULTURE ET DE L'AMÉNAGEMENT RURAL
DU NOUVEAU-BRUNSWICK

ÉTUDE SUR L'EFFICACITÉ DE LA PUBLICITÉ AXÉE
SUR LE SLOGAN "CULTIVÉ AU NOUVEAU-BRUNSWICK"

NUMÉRO DE TÉLÉPHONE _____
ANNUAIRE _____

Bonjour. Votre numéro de téléphone est-il (DONNEZ LE
NUMÉRO QUE VOUS AVEZ COMPOSÉ. SI LA RÉPONSE EST
NON, DITES: Excusez-moi de vous avoir dérangé.
RACCROCHEZ.)

Ici _____, de Clendenning
Associates, une compagnie de recherche sur la mise
en marché. Nous menons auprès des ménages une
enquête sur les produits alimentaires de l'agriculture,
c'est-à-dire les aliments produits, cultivés ou
provenant d'animaux élevés à la ferme. Les gens qui
s'occupent de l'agriculture se serviront des résultats
de l'enquête pour améliorer leurs programmes actuels
de mise en marché et de publicité. Toutes vos
réponses sont strictement confidentielles.

Êtes-vous la personne qui s'occupe le plus de l'achat
des aliments pour ceux qui habitent chez vous?

OUI.
NON.

Est-ce que je pourrais parler à cette personne-là?

LORSQUE LA PERSONNE DEMANDÉE
RÉPOND, RECOMMENCEZ L'INTRODUCTION
PUIS COMMENCEZ L'INTERVIEW.

OUI.
NON.

↓
SI LA PERSONNE DEMANDÉE N'EST
PAS LÀ, DEMANDEZ QUAND SERAIT
UN BON TEMPS POUR LA RAPPELER
ET INSCRIVEZ LA RÉPONSE SUR
VOTRE FICHE. REMERCIEZ LA
PERSONNE À QUI VOUS PARLEZ
PUIS RACCROCHEZ.

(L'INTERVIEW COMMENCE.)

Les questions que je dois vous poser ne devraient prendre que
cinq ou six minutes. Mais, avant de commencer, j'aimerais vous
dire que ça me ferait plaisir de répondre à toute question que
vous pourriez avoir au sujet de l'enquête, soit maintenant ou
plus tard. D'accord?

QUESTIONS OU COMMENTAIRES:

PREMIÈRE SECTION

J'aimerais commencer en vous posant des questions sur vos habitudes d'achat de produits alimentaires de l'agriculture. Je vous rappelle que cela veut dire tout aliment produit, cultivé ou provenant d'animaux élevés à la ferme.

1. Avant d'acheter des produits alimentaires d'agriculture, en général vérifiez-vous l'endroit où ils ont été cultivés ou produits?

NON..... 01
OUI..... 02
NE SAIT PAS..... 66
NE S'APPLIQUE PAS.. 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE. 99
AUTRE..... 03
(PRÉCISEZ _____)

2. Cela fait-il une différence dans votre choix?

NON..... 01
OUI..... 02
NE SAIT PAS..... 66
NE S'APPLIQUE PAS.. 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE. 99
AUTRE..... 03
(PRÉCISEZ _____)

3. Quelle région de production ou de culture, ou encore, quelle province préférez-vous?

PRODUITS LOCAUX DU DU NOUVEAU-BRUNSWICK..... 04
DE L'ÎLE-DU-PRINCE-ÉDOUARD..... 05
DE LA RÉGION DE L'ATLANTIQUE OU DES MARITIMES. 06
PRODUITS CANADIENS..... 07
NE SAIT PAS..... 66
NE S'APPLIQUE PAS..... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE..... 99
AUTRE..... 03
(PRÉCISEZ _____)

- 4a) Le prix des produits alimentaires de l'agriculture au Nouveau-Brunswick, si on le compare à celui des produits des autres régions ou provinces, vous paraît-il beaucoup plus élevé, un peu plus élevé, à peu près le même, un peu moins élevé ou beaucoup moins élevé que celui de la plupart des autres produits? (REPÉTEZ LES CATEGORIES, AU BESOIN.)

BEAUCOUP PLUS ÉLEVÉ.. 04
UN PEU PLUS ÉLEVÉ... 05
À PEU PRÈS LE MÊME... 06
UN PEU MOINS ÉLEVÉ.. 07
BEAUCOUP MOINS ÉLEVÉ. 08
NE SAIT PAS..... 66
NE S'APPLIQUE PAS.... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE... 99
AUTRE..... 03
(PRÉCISEZ _____)

- 4b) Comment trouvez-vous l'offre, c'est-à-dire trouvez-vous qu'on peut facilement se procurer des produits alimentaires de l'agriculture au Nouveau-Brunswick? Diriez-vous qu'on peut s'en procurer la plus grande partie de l'année, environ la moitié de l'année, durant quelques mois seulement ou durant quelques semaines seulement? (REPÉTEZ LES CATEGORIES, AU BESOIN.)

LA PLUS GRANDE PARTIE DE L'ANNÉE.. 04
 ENVIRON LA MOITIÉ DE L'ANNÉE..... 05
 QUELQUES MOIS SEULEMENT..... 06
 QUELQUES SEMAINES SEULEMENT..... 07
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

- c) Comment trouvez-vous la qualité des produits alimentaires de l'agriculture au Nouveau-Brunswick, si on la compare à la qualité des produits des autres régions? Diriez-vous que la qualité de nos produits est beaucoup meilleure, un peu meilleure, à peu près la même, un peu moins bonne ou beaucoup moins bonne? (REPÉTEZ LES CATEGORIES, AU BESOIN.)

BEAUCOUP MEILLEURE..... 04
 UN PEU MEILLEURE..... 05
 À PEU PRÈS LA MÊME..... 06
 UN PEU MOINS BONNE..... 07
 BEAUCOUP MOINS BONNE... 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

DEUXIÈME SECTION

J'aimerais maintenant vous poser quelques questions au sujet des annonces qui ont trait aux produits alimentaires de l'agriculture qui sont produits, cultivés ou proviennent d'animaux élevés à la ferme.

5. Avez-vous jamais vu, lu ou entendu des annonces portant sur des produits alimentaires de l'agriculture au Nouveau-Brunswick?

NON..... 01
 OUI..... 02
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

6. Avez-vous jamais vu, lu ou entendu le slogan ou l'expression
"Des produits de choix pour vous"?

NON..... 01
OUI..... 02
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

7. Avez-vous jamais vu, lu ou entendu le symbole ou la marque de
commerce "Cultivé au Nouveau-Brunswick"?

NON..... 01
OUI..... 02
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

SI LE RÉPONDANT A RÉPONDU NON À LA QUESTION 6 ET À LA QUESTION 7,
PASSEZ A LA TROISIÈME SECTION, A LA PAGE 9.

8a) Avez-vous jamais vu, lu ou entendu, à la télévision, les
symboles "Cultivé au Nouveau-Brunswick" ou "Des produits
de choix pour vous"?

SI LA RÉPONSE EST NON,
PASSEZ A LA QUESTION 9.

NON..... 01
OUI..... 02
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

b) De quoi, dans les annonces à la télévision, vous souvenez-vous?

LE SYMBOLE "CULTIVÉ AU NOUVEAU-BRUNSWICK".. 04
LE SLOGAN..... 05
LES PAROLES..... 06
LES IMAGES..... 07
LA MUSIQUE..... 08
TEL OU TEL PRODUIT..... 09
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

INSCRIVEZ TOUT COMMENTAIRE PARTICULIER QUE
LE RÉPONDANT FAIT AU SUJET DES ANNONCES.

c) Quand avez-vous remarqué les annonces à la télévision?

AVANT 1982..... 04
 DÉBUT 1982 (janvier, février, mars)..... 05
 PRINTEMPS 1982 (avril, mai, juin)..... 06
 ÉTÉ 1982 (juillet et août)..... 07
 AUTOMNE 1982 (septembre, octobre, novembre).. 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

9a) Avez-vous jamais entendu, à la radio, les slogans ou les symboles "Cultivé au Nouveau-Brunswick" ou "Des produits de choix pour vous"?

SI LA RÉPONSE EST NON,
 PASSEZ À LA QUESTION 10.

NON..... 01
 OUI..... 02
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

b) De quoi, dans les annonces à la radio, vous souvenez-vous?

LE SYMBOLE "CULTIVÉ AU NOUVEAU-BRUNSWICK".. 04
 LE SLOGAN..... 05
 LES PAROLES..... 06
 LA MUSIQUE..... 07
 TEL OU TEL PRODUIT..... 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

INSCRIVEZ TOUT COMMENTAIRE PARTICULIER QUE
 LE RÉPONDANT FAIT AU SUJET DES ANNONCES.

c) Quand avez-vous entendu les annonces à la radio?

AVANT 1982..... 04
 DÉBUT 1982 (janvier, février, mars)..... 05
 PRINTEMPS 1982 (avril, mai, juin)..... 06
 ÉTÉ 1982 (juillet et août)..... 07
 AUTOMNE 1982 (septembre, octobre, novembre).. 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

10e) Avez-vous jamais vu ou lu, dans le journal, les slogans ou symboles "Cultivé au Nouveau-Brunswick" ou "Des produits de choix pour vous"?

SI LA RÉPONSE EST NON,
PASSEZ À LA QUESTION 11.

NON..... 01
OUI..... 02
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

b) De quoi, dans les annonces dans le journal, vous souvenez-vous?

LE SYMBOLE "CULTIVÉ AU NOUVEAU-BRUNSWICK".. 04
LE SLOGAN..... 05
LE TEXTE..... 06
LES RECETTES..... 07
TEL OU TEL PRODUIT..... 08
LA PRÉSENTATION GRAPHIQUE..... 09
NE SAIT PAS..... 66
NE S'APPLIQUE PAS..... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE..... 99
AUTRE..... 03
(PRÉCISEZ _____)

INSCRIVEZ TOUT COMMENTAIRE PARTICULIER QUE
LE RÉPONDANT FAIT AU SUJET DES ANNONCES.

c) Quand avez-vous vu les annonces dans le journal?

AVANT 1982..... 04
DÉBUT 1982 (janvier, février, mars)..... 05
PRINTEMPS 1982 (avril, mai, juin)..... 06
ÉTÉ 1982 (juillet et août)..... 07
AUTOMNE 1982 (septembre, octobre, novembre).. 08
NE SAIT PAS..... 66
NE S'APPLIQUE PAS..... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE..... 99
AUTRE..... 03
(PRÉCISEZ _____)

11e) Avez-vous jamais vu ou lu, dans des magasins d'alimentation, les slogans ou les symboles "Cultivé au Nouveau-Brunswick" ou "Des produits de choix pour vous"?

SI LA RÉPONSE EST NON,
PASSEZ À LA QUESTION 12.

NON..... 01
 OUI..... 02
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

b) De quel, dans les annonces dans les magasins d'alimentation, vous souvenez-vous?

LE SYMBOLE "CULTIVÉ AU NOUVEAU-BRUNSWICK".. 04
 LE SLOGAN..... 05
 LES AFFICHES..... 06
 LES CARTES DES PRIX..... 07
 TEL OU TEL PRODUIT..... 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

INSCRIVEZ TOUT COMMENTAIRE PARTICULIER QUE
 LE RÉPONDANT FAIT AU SUJET DES ANNONCES.

c) Quand avez-vous vu les annonces dans les magasins d'alimentation?

AVANT 1982..... 04
 DÉBUT 1982 (janvier, février, mars)..... 05
 PRINTEMPS 1982 (avril, mai, juin)..... 06
 ÉTÉ 1982 (juillet et août)..... 07
 AUTOMNE 1982 (septembre, octobre, novembre).. 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

12a) Avez-vous déjà vu, lu ou entendu les slogans ou les symboles
 "Cultivé au Nouveau-Brunswick" ou "Des produits de choix pour vous",
 dans un étalage dans un centre d'achats ("mail")?

SI LA RÉPONSE EST NON,
 PASSEZ À LA TROISIÈME SECTION.

NON..... 01
 OUI..... 02
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

b) De quoi, dans l'étalage au centre d'achats ("mail"),
 vous souvenez-vous?

LE SYMBOLE "CULTIVÉ AU NOUVEAU-BRUNSWICK".. 04
 LE SLOGAN..... 05
 LES AFFICHES..... 06
 LES DÉMONSTRATIONS D'ALIMENTS..... 07
 LES DESSINS DES CONCOURS..... 08
 LES RECETTES..... 09
 TEL OU TEL PRODUIT..... 10
 LA MUSIQUE..... 11
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

INSCRIVEZ TOUT COMMENTAIRE PARTICULIER QUE
 LE RÉPONDANT FAIT AU SUJET DES ÉTALAGES.

c) Quand avez-vous vu l'étalage au centre d'achats ("mail")?

AVANT 1982..... 04
 DÉBUT 1982 (janvier, février, mars)..... 05
 PRINTEMPS 1982 (avril, mai, juin)..... 06
 ÉTÉ 1982 (juillet et août)..... 07
 AUTOMNE 1982 (septembre, octobre, novembre).. 08
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS..... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE..... 99
 AUTRE..... 03
 (PRÉCISEZ _____)

TROISIÈME SECTION

En dernier lieu, j'aimerais vous poser quelques questions au sujet de vous-même, afin de nous aider à interpréter les résultats de l'enquête. Cette information est strictement confidentielle.

13. En quelle année êtes-vous né?

1963-1982..... 04
 1953-1962..... 05
 1943-1952..... 06
 1933-1942..... 07
 1923-1932..... 08
 1913-1922..... 09
 1912 OU AVANT..... 10
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

14. Combien de personnes, y compris vous-même, vivent chez vous?

1 PERSONNE..... 04
 2 PERSONNES..... 05
 3 PERSONNES..... 06
 4 PERSONNES..... 07
 5 PERSONNES..... 08
 6 PERSONNES..... 09
 PLUS DE PERSONNES... 10
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

15. En quelle année (quel "grade") étiez-vous lorsque vous avez quitté l'école, ou quelles études avez-vous terminées?

N'A PAS FRÉQUENTÉ L'ÉCOLE..... 04
 A FRÉQUENTÉ L'ÉCOLE PRIMAIRE ET SECONDAIRE 1ER CYCLE... 05
 A TERMINÉ SA 9^E ANNÉE (SECONDAIRE 1ER CYCLE)..... 06
 A FRÉQUENTÉ L'ÉCOLE SECONDAIRE 2E CYCLE..... 07
 A TERMINÉ L'ÉCOLE SECONDAIRE 2E CYCLE..... 08
 A FRÉQUENTÉ L'UNIVERSITÉ..... 09
 A TERMINÉ SES ÉTUDES UNIVERSITAIRES..... 10
 A FAIT DES ÉTUDES SUPÉRIEURES..... 11
 A TERMINÉ DES ÉTUDES SUPÉRIEURES..... 12
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

16. Quelle langue parlez-vous à la maison, normalement? (SI LA PERSONNE HESITE: Le français, l'anglais ou une autre langue?)

FRANÇAIS..... 04
 ANGLAIS..... 05
 NE SAIT PAS..... 66
 NE S'APPLIQUE PAS... 77
 PAS ÉTABLI..... 88
 REFUSE DE RÉPONDRE.. 99
 AUTRE..... 03
 (PRÉCISEZ _____)

17. En 1981, votre revenu familial, c'est-à-dire :
le revenu total de tous qui gagnent un salaire, était-il plus de
.20 000 \$ ou moins de 20 000 \$?

PLUS DE 20 000 \$.... 04
MOINS DE 20 000 \$... 05
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

17a) Était-il plus de 14 000 \$ ou moins de 14 000 \$?

PLUS DE 14 000 \$.... 06
MOINS DE 14 000 \$... 07
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

17b) Était-il plus de 30 000 \$ ou moins de 30 000 \$?

PLUS DE 30 000 \$.... 08
MOINS DE 30 000 \$... 09
NE SAIT PAS..... 66
NE S'APPLIQUE PAS... 77
PAS ÉTABLI..... 88
REFUSE DE RÉPONDRE.. 99
AUTRE..... 03
(PRÉCISEZ _____)

18. Merci beaucoup pour votre temps et votre collaboration.

19. INDIQUEZ LE SEXE.

HOMME...1
FEMME...2

NOM DE L'INTERVIEWER _____

DATE _____

APPENDIX II

RESPONDENTS COMMENTS

RESPONDENTS COMMENTS

The comments listed below are representative of those made by respondents during the course of the interviews. Generally, the list includes comments that were made at least three or more times.

- . I buy the cheapest product I can find and it doesn't matter where it is cultivated.
- . I consider where it is produced as well as price.
- . I work in a grocery store and am quite familiar with the food store advertising.
- . I live alone and don't purchase a large amount of products.
- . I own my own vegetable garden.
- . Sometimes I look to see where a product is grown.
- . Sometimes where a product is grown makes a difference.
- . I buy P.E.I. potatoes
- . What is available and price is important.
- . I buy a lot at the local Coop store
- . Quality depends on the season and the product.
- . The price depends on the season and the product.
- . I don't watch much T.V.
- . The T.V. ads are well produced especially the jingle "Our Best Belongs to You".
- . I just saw the T.V. ad a few minutes ago.
- . I can remember potato ads. (T.V.)
- . Remember what the logo represents (T.V.)
- . I remember the explanation of the symbol (T.V.)
- . Remember the symbol and pictures of New Brunswick. (T.V.)
- . Recall a house and the flower. (T.V.)
- . I remember a farm and N.B. products. (T.V.)

- . I don't listen to radio
- . I received pamphlets in the mail with coupons.
- . Remember a flyer, looked at it all because it was so bright and attractive.
- . Saw ads for potatoes and apples
- . Remember seeing advertising in the Save Easy.
- . Recall advertising on carrots and apples.
- . Bright display, colourful posters, orange colour attracted me.
- . Remember seeing advertising at exhibitions.

APPENDIX III
ADDITIONAL TABLES OF INTEREST

This appendix includes crosstabulation tables which, though questionable in terms of their statistical significance, may be of interest to the Department.

RELATIONSHIP BETWEEN PRICE OPINION OF N.B. AGRICULTURAL FOOD
PRODUCTS AND RESPONDENTS INCOME

<u>PRICE OPINION</u>	<u>LESS THAN \$14,000</u>	<u>\$14,000- \$20,000</u>	<u>\$20,001- \$30,000</u>	<u>MORE THAN \$30,000</u>	<u>TOTAL</u>
Other	2 22.2	2 22.2	4 44.4	1 11.1	9 3.7
Much Higher than Cost	1 11.1	3 33.3	4 44.4	1 11.1	9 3.7
Little Higher than Cost	8 25.8	13 41.9	6 19.4	4 12.9	31 12.9
About the Same as Most	44 29.5	53 35.6	36 24.2	16 10.7	149 61.8
Little Lower than Most	13 31.7	14 34.1	8 19.5	6 14.6	41 17.0
Much Lower than Most	1 50.0	0 0	1 50.0	0 0	2 0.8
TOTAL	69 28.6	85 35.3	59 24.5	28 11.6	241 100.0

$$\chi^2 - 8.15 \quad P - .9176$$

Number of Missing Observations = 85
The probability that a relationship exists
is 8.24%.

Although one might expect that respondents with a lower income would have a more negative opinion of the price of N.B. agricultural food products, this table appears to indicate that there is virtually no relationship between price opinions and incomes.

RELATIONSHIP BETWEEN AREA OF THE PROVINCE AND QUALITY
OPINION OF N.B. AGRICULTURAL FOOD PRODUCTS

AREA OF PROVINCE	OTHER	MUCH BETTER THAN MOST	SLIGHTLY BETTER THAN MOST	ABOUT THE SAME	SLIGHTLY POORER THAN MOST	MUCH POORER THAN MOST	TOTAL
Newcastle	1 4.5	10 45.5	3 13.6	8 36.4	0 0	0 0	22 7.6
Edmundston	0 0	8 29.6	6 22.2	12 44.4	1 3.7	0 0	27 9.3
Campbellton	0 0	4 28.6	5 35.7	4 28.6	1 7.1	0 0	14 4.8
Woodstock	0 0	5 25.0	5 25.0	10 50.0	0 0	0 0	20 6.9
Fredericton	0 0	12 28.6	16 38.1	13 31.0	1 2.4	0 0	42 14.5
Bathurst	0 0	12 30.8	10 25.6	17 43.6	0 0	0 0	39 13.5
Moncton	0 0	12 19.0	16 25.4	34 54.0	0 0	1 1.6	63 21.8
Saint John	0 0	14 25.0	24 42.9	16 28.6	1 1.8	1 1.8	56 19.4
St. Stephen	0 0	1 16.7	3 50.0	1 16.7	1 16.7	0 0	6 2.1
TOTAL	1 0.3	78 27.0	88 30.4	115 39.8	5 1.7	2 0.7	289 100.0

$$x^2 - 49.33 \quad p - .1480$$

Number of Missing Observations = 37

The probability that a relationship exists is 85.20%.

All areas of the province appear to exhibit a relatively high quality opinion of N.B. Agricultural Food Products.

RELATIONSHIP BETWEEN AREA OF PROVINCE AND
IMPACT OF WHERE PRODUCED ON CHOICE

<u>AREA OF PROVINCE</u>	<u>NO</u>	<u>YES</u>	<u>OTHER</u>	<u>TOTAL</u>
Newcastle	0 0	10 100.0	0 0	10 6.1
Edmundston	0 0	10 83.3	2 16.7	12 7.3
Campbellton	0 0	9 100.0	0 0	9 5.5
Woodstock	1 7.7	11 84.6	1 7.7	13 7.9
Fredericton	1 3.3	29 96.7	0 0	30 18.3
Bathurst	1 7.1	13 92.9	0 0	14 8.5
Moncton	3 8.6	31 88.6	1 2.9	35 21.3
Saint John	6 17.1	29 82.9	0 0	35 21.3
St. Stephen	1 16.7	5 83.3	0 0	6 3.7
TOTAL	13 7.9	147 89.6	4 2.4	164 100.0

$\chi^2 - 22.32$

$p - .1333$

Number of Missing Observations = 162

The probability that a relationship exists is 86.67%.

Of those who checked to see where a product is produced, the vast majority in all areas say this makes a difference in their choice. This is particularly true of respondents from Newcastle, Campbellton and Fredericton.

RELATIONSHIP BETWEEN AREA OF PROVINCE AND LOOK TO
SEE WHERE PRODUCED

<u>AREA OF PROVINCE</u>	<u>NO</u>	<u>YES</u>	<u>OTHER</u>	<u>TOTAL</u>
Newcastle	11 50	11 50	0 0	22 6.8
Edmundston	15 53.6	13 46.4	0 0	28 8.6
Campbellton	6 40.0	9 60.0	0 0	15 4.6
Woodstock	7 35.0	12 60.0	1 5.0	20 6.2
Fredericton	17 35.4	30 62.5	1 2.1	48 14.8
Bathurst	27 65.9	14 34.1	0 0	41 12.6
Moncton	39 53.4	34 46.6	0 0	73 22.5
Saint John	29 45.3	35 54.7	0 0	64 19.7
St. Stephen	8 57.1	6 42.9	0 0	14 4.3
TOTAL	159 48.9	164 50.5	2 0.6	325 100.0

$$\chi^2 - 20.40$$

$$p - .2026$$

Number of missing observations = 1

The probability that a relationship exists is 79.74%.

It appears that respondents in Fredericton, Woodstock and Campbellton are more likely to look to see where a product is produced before purchasing. While respondents in Bathurst were least likely to check a product's source.

RELATIONSHIP BETWEEN AWARENESS OF ANY ADVERTISING AND
RESPONDENT'S LANGUAGE

<u>AWARE OF ADVERTISING</u>	<u>BILINGUAL</u>	<u>OTHER</u>	<u>FRENCH</u>	<u>ENGLISH</u>	<u>TOTAL</u>
NO	6 5.1	1 0.9	27 23.1	83 70.9	117 37.0
YES	12 6.0	1 0.5	65 71 32.7	121 59 60.8	199 63.0
TOTAL	18 5.7	2 0.6	92 29.1	204 64.6	316 100.0

$$\chi^2 - 18.85$$

$$p - .0265$$

Number of Missing Observations = 10

The probability that a relationship exists is 71.0%.

There appears to be little difference between French and English respondents with respect to level of awareness of advertising for N.B. Agricultural Food Products.

RELATIONSHIP BETWEEN AREA OF PROVINCE AND AWARENESS
OF MALL DISPLAYS

<u>AREA OF PROVINCE</u>	<u>NO</u>	<u>YES</u>	<u>TOTAL</u>
22 Newcastle	14 82.4	3 17.6	17 6.8
29 Edmundston	15 75.0	5 25.0	20 8.0
16 Campbellton	9 81.8	2 18.2	11 4.4
20 Woodstock	15 93.8	1 6.3	16 6.4
48 Fredericton	38 86.4	6 13.6	44 17.5
41 Bathurst	24 77.4	7 22.6	31 12.4
03 Moncton	41 85.4	7 14.6	48 19.1
66 Saint John	39 76.5	12 23.5	51 20.3
14 St. Stephen	12 92.3	1 7.7	13 5.2
TOTAL	207 82.5	44 17.5	251 100.0

$$\chi^2 - 5.62$$

$$p - .6897$$

Number of Missing Observations = 75

The probability that a relationship exists is 31.03%.

Mall Awareness was low in all areas of the province. Areas showing the highest awareness were Edmundston, Saint John and Bathurst.

